

Increase inputs to validate, and promote transfer of OTEC's R&D activities - 2002 year report Work Package 3

Citation for published version (APA):

Beijering, J., & Kluijfhout, E. (2003). *Increase inputs to validate, and promote transfer of OTEC's R&D activities - 2002 year report Work Package 3*.

Document status and date:

Published: 19/06/2003

Document Version:

Peer reviewed version

Please check the document version of this publication:

- A submitted manuscript is the version of the article upon submission and before peer-review. There can be important differences between the submitted version and the official published version of record. People interested in the research are advised to contact the author for the final version of the publication, or visit the DOI to the publisher's website.
- The final author version and the galley proof are versions of the publication after peer review.
- The final published version features the final layout of the paper including the volume, issue and page numbers.

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Educational Technology Expertise Centre OTEC
Open University of the Netherlands

2002 year report

Work Package 3

Increase inputs to validate, and promote transfer of OTEC's R&D activities

COLOPHON

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Report type:	Year report
Publication date:	30 March 2004
Document reference:	U2003/4789 MMO
Distribution:	Project management Development Programme

Educational Technology Expertise Centre (OTEC)
Open University of the Netherlands

2002 year report Work Package 3

Increase inputs to validate, and promote transfer of OTEC's R&D activities

OTEC report series

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Summary

This annual report covers the Work Package 3 (WP3) activities of the OTEC Development Programme over the period January-December 2002. The formal approval date of the WP3 work plan was April 2002. The realised staff input to WP3 was about 1 FTE.

The objective of WP3 was 'to increase inputs to, validate, and promote transfer of, OTEC's R&D activities' For 2002 three targets were specified:

1. To establish and lead a network for the specification of a technical architecture for EML tooling.
2. To acquire, and participate in, externally funded projects through which the activities in WP1, WP2 and WP4 will be further supported: either through providing additional capacity, or through capitalising on R&D investments already made in the past.
3. To prepare for the Sixth Framework Programme of the European Union, to be officially launched in the second half of 2002.

Each of these targets was fully realised: target 1 resulted in the founding of the Valkenburg Group, comprising about 20 international e-learning RTD centres, suppliers and users; target 2 resulted in the start of four co-funded European projects (one of which was already approved in 2001) in which OTEC participates as a partner; and for target 3 a number of preparatory activities resulted in a favourable starting position for 2003.

2003 will pose two major challenges:

- The new Development programme will start, while a number of activities from the old programme will still continue. This is especially true for the main activities under WP3: the Valkenburg Group and running European projects. The major challenge will be to (partly) redefine and redirect these activities in such a way that they will contribute substantially to the new programme.
- The second major challenge is the acquisition of co-funded projects, as the experiences in 2002 have shown that this is extremely worthwhile in terms of (re)covering staff inputs.

Heerlen, 7 May 2003.

1. Introduction

This annual report covers the Work Package 3 (WP3) activities of the OTEC Development Programme over the period January-December 2002. The formal approval date of the WP3¹ work plan was April 2002. WP3 team members comprised Eric Kluijfhout (projectmanager), Jan Beijering and Peter Sloep (the latter from May/June 2002 onwards).

The report starts with a description of the WP3 objectives (chapter 2), followed by the planned targets and related activities (chapter 3). For each of the targets the realised outcomes are presented in chapter 4. The required staff inputs – planned and realised – are listed in chapter 5. Chapter 6 presents the conclusions and lessons learned, while a preview to the next year is given in chapter 7. Relevant process- and milestone documents are included as annexes.

2. WP3 objective

WP3 is part of the OTEC Development Programme (DP) as outlined in the programme description. This implies that the activities initiated and supported through WP3 target the development, validation and dissemination of innovations in higher and distance education and its underlying learning technologies.

Early 2002 the objective of WP3 was formulated as: **'to increase inputs to, validate, and promote transfer of, OTEC's R&D activities.'** Two types of activities were foreseen:

- Acquisition of European projects through which the development programme could broaden its scope and indirectly strengthen the standardisation activities through promotion of EML as a de-facto standard
- Establishing an expert network for the development and future testing of a technical architecture for EML tooling, including authoring and content management.

WP3 operates in support to the other Work Packages and should thus strengthen activities already defined under WP1, WP2 and WP4 through networking and project acquisition. This should generate additional activity funded additionally; commit additional capacity to learning technologies specification by cooperating with partners; and advance OUNL and OTEC's international institutional image. The bottom line for WP-3's success should be increased development output and dissemination.

3. Targets and planned activities for 2002

For 2002 the specified targets and activities were:

1. To establish and lead a network for the specification of a technical architecture for EML tooling. This should be realised through the following activities:
 - 1.1. Organise a conference on 'Developing an EML authoring & content management environment', resulting in the establishment of a more formal network around this topic.
 - 1.2. Start preparations for an event for early 2003.
 - 1.3. Establish contacts with training and R&D departments of large (multi-national) companies.
 - 1.4. Assist WP1 in establishing a related SIG.
 - 1.5. Assist the webmaster in managing and moderation EML-website.

¹ See annex 1 for the WP3 Work Plan 2002.

2. To acquire, and participate in, externally funded projects through which the activities in WP1, WP2 and WP4 will be further supported: either through providing additional capacity, or through capitalising on R&D investments already made in the past. This should be realised through the following activities:
 - 2.1. Start two projects (FP5), in which DP participates with activities defined for WP1/WP2/WP4.
 - 2.2. Prepare for FP6 (strengthen and broaden our European network; coordination with OUNL strategy).
3. To prepare for the Sixth Framework Programme of the European Union, to be officially launched in the second half of 2002.
 - 3.1. Visit a number of (international) R&D events and present OTEC's body of ideas and products to international fora.
 - 3.2. Build up knowledge about public-private partnerships.
 - 3.3. Participate in the development of an OUNL-wide international strategy.

The next chapter will report on each of these activities under their respective targets.

4. Results

4.1 Results under target 1.

This target was defined as 'To establish and lead a network for the specification of a technical architecture for EML tooling.' Five activities were planned to realise this target. Each of these will be reported on below.

4.1.1 Activity 1.1.

The first activity was to organise a three-day conference on 'Developing an EML authoring & content management environment', resulting in the establishment of a more formal network around this topic.

March 20-22 the OUNL facilitated a 3-day invited work conference on 'Developing an EML authoring and content management environment', in Valkenburg, the Netherlands. The conference brought together around 20 recognized R&D institutions in the field of e-learning technologies, users, and private sector parties from all over the world².

The conference addressed two key requirements:

- Creating, adapting, and previewing content in a user-friendly way while still allowing for the use of advanced instructional design, personalization, multi channelling, etc.
- Storing, searching, sharing and reusing content within a defined community.

The specific objectives of the conference were to:

- develop a common framework for EML authoring and content management (reference architecture)
- develop a business model (or more general a model for collaboration)
- agree on future joint activities in this field

² See annex 2 for the agenda and invited participants to the Valkenburg conference.

Prior to the conference the invited participants were required to send in a description of their required authoring and content management environment³ in the form of Domain Diagrams and related Use Cases, using UML⁴-notation. These requirements were compared, categorised and summarised by WP-3, resulting in an input-document to the conference⁵.

The conference program comprised plenary sessions and workshops. The plenary sessions focussed on the analysis of a preliminary architecture for an EML design, authoring and content management system, and the possible workflows involved. Two parallel workshops looked at the domain model, and at possible business models.

The outcomes of the conference comprised:

- ❑ A component-based architecture for e-learning, with as its main components: tool repository; runtime simulation system; EML constraints editor; Learning Design Editor; EML Repository; Stylesheet Editor; Materials Repository; Materials Editor(s); Metadata Editor; Search toolkit.
- ❑ A two-layered business model for cooperation: at level one the members of the Valkenburg Group work jointly at the reference architecture, while at level 2 all possible parties carry out proto-typing, demonstration, dissemination, development, etc. projects based on the reference architecture. Level 1 membership is restricted, while level 2 participation is in principle open to anyone as long as the reference architecture is applied. The experiences from level 2 feed back into level 1.
- ❑ Agreement on a list of architecture components and interested partners.

At the conclusion of the conference the participants signed the 'Valkenburg declaration', in which the intention of the group is expressed⁶.

After establishing the Valkenburg Group in March, two additional one-day meetings were held: one in Boston⁷ (May) and one in Paris⁸ (September).

During the Boston meeting, six out of the seventeen member organizations attended. The individual members had various relevant issues and progress to report on. However, the lack of a work plan at that time (May 2, 2002) to structure activities between meetings, and to focus discussion during the meeting, was apparent. The development of such a work plan therefore was assigned highest priority.

Defining in-scope and out-of-scope components of the architecture remained a constant issue for discussion. There was and still is a need to further detail the reference architecture. Issues discussed in this respect were mapping to the IMS LD levels A, B and C; mapping onto the OpenVES architecture; and interfacing to the OKI architecture (which focuses on infrastructural services).

During the Paris meeting fourteen organizations attended. Most of those who could not attend had sent in their apologies. The emphasis during this meeting was on the

³ See annex 3 for the required format for the requirements description.

⁴ Unified Modelling Language, which provides a structured 'stepping stone' to the compilation of technical specifications.

⁵ See annex 4 for the conference input-document.

⁶ See annex 5 for the Valkenburg proceedings.

⁷ See annex 6 for the proceedings of the Valkenburg Group Meeting in Boston May 2, 2002.

⁸ See annex 7 for the proceedings of the Valkenburg Group Meeting in Paris, September 28, 2002.

presentation of level-2 initiatives and on deciding how to proceed with the reference architecture⁹. The presentations provided a good overview of the scope and depth of initiatives and projects being developed around EML tooling. The main outcome of this meeting was the realization that level-2 activities do not only follow level-1 (the developed reference architecture) but can also provide considerable input to its development. Especially decisions about the right level of granularity are strongly influenced by implementation considerations. For the work procedure at level 1 it was decided to opt for a year-cycle which will produce an updated reference architecture annually.

From the middle of 2002 Peter Sloep joined the WP3 team to strengthen the technical input to the Valkenburg Group. With both the organizational and technical demands made on WP3 growing, the need for structural funding for the Valkenburg Group activities became pressing. It was decided to opt for funding under the Sixth Framework Programme of the European Commission (see under section 4.3).

4.1.2 Activity 1.2

This activity, to 'Start preparations for an event for early 2003.' actually comprises the organisation of the fourth Valkenburg Group meeting, scheduled for February 2003 in Vancouver, Canada. Preparations related to the organization of the conference started in December 2002.

4.1.3 Activity 1.3

At the start of the preparations for the first Valkenburg Group conference late 2001, it became clear that major ICT developers would only consider joining the Valkenburg Group when their large (potential) customers would also participate. To broaden our contacts in this area, it was decided to 'Establish contacts with training and R&D departments of large (multi-national) companies'.

At the first Valkenburg Group conference however, it was concluded that the participation at level 1 of this type of companies was not (yet) required, and actually could be counterproductive at this stage, due to the economic interests of these companies. No further efforts were therefore invested in this activity.

4.1.4 Activity 1.4

The general aim of WP3 is to contribute to the output of the other WP's, by securing additionally funded capacity. Because WP1 generates the major (conceptual) innovations in the programme, this WP is the main 'customer' of WP3. Therefore it was decided that WP3 should 'Assist WP1 in establishing a related SIG'.

After the successful first meeting of the Valkenburg Group, it was decided to position this WP1-SIG as part of the Valkenburg Group. To this effect WP1 presented itself and its activities at the third meeting in Paris. In addition, it was decided to submit the report 'Modelling test interactions' developed under WP2 for review to the members.

⁹ See annex 8 for the Workplan for the Valkenburg group.

4.1.5 Activity 1.5

To inform the outside world on the activities of WP3, WP3 should 'Assist the webmaster in managing and moderation of the EML-website'. In practice the webmaster did not require assistance beyond the submission of occasional news items on WP3 activities and the Valkenburg Group meetings.

At the Boston meeting it was decided that the Valkenburg Group needed a virtual working environment at level 1 to work on the reference architecture, while at the Paris meeting also the need for cooperation between development teams at level 2 was acknowledged. As a result the webmaster designed a new information and communication architecture in 2002, to be implemented early 2003 as www.learningnetworks.org.

4.1.6 Status target 1

- ❑ Architecture development under the Valkenburg Group has to be planned and detailed in the form of an annual cycle.
- ❑ The Edubox player has to be made available to the Valkenburg partners for testing and demonstration activities.
- ❑ The OUNL input to the Valkenburg Group should be structurally financed.

4.2 Results under target 2

The second target for 2002 was 'To acquire and participate in externally funded projects.' Three externally funded projects were approved and started up in 2002. At the same time activities included preparations for the Sixth Framework Programme (FP6)¹⁰.

4.2.1 Activity 2.1

The minimal aim was to 'Start two projects (FP5), in which DP participates with activities defined for WP1/WP2/WP4.'

In 2001 the Alfabet (Active learning for adaptive internet) proposal¹¹ was submitted, and negotiations with the Commission were concluded early 2002. Activities started in May with a kick-off in Madrid. The project targets personalised learning through the internet for company workers, with the aim of improving their professional performance. OTEC is responsible for the work package on standards and the work package on the LMS Administration and Support System. Required OTEC capacity totals 104 person months over the three-year project period. The coordination of the OTEC project activities was assigned to Peter van Rosmalen, directly under the Programme Director.

¹⁰ This is a European RTD-programme under which consortia of European partners carry out co-funded RTD projects.

¹¹ See annex 9 for the Alfabet Project Document.

In February 2002 the SDL (Personalisation: the Self Directed Learner) proposal¹² was submitted for the second time¹³ under call 8 of FP5. The proposal passed official assessment, but was again ranked too low for funding.

Under the same call OTEC participated in the submission of two other projects: e-LearnTN (e-Learning Thematic Network)¹⁴ and Time2Learn¹⁵. Both projects aim to develop a European RTD roadmap for the field of e-learning technologies under the Information Society Technologies (IST) programme. Time2Learn focuses on European (working) professionals, while e-LearnTN focuses on institutions of higher distance teaching. In strategic terms, these two projects provide an opportunity to develop – co-funded by the Commission – a consortium in preparation for FP6 activities. Participation thus implies a favourable starting position for FP6: both financially and politically (more details under activity 2.2).

The e-LearnTN activities started in September with a kick-off in Madrid. The main project goals are to develop an RTD roadmap for Europe's knowledge services and to form a consortium in preparation for the Sixth Framework Programme (FP6). OTEC's main role is to lead the work package that defines the e-learning domain model that serves as framework to the rest of the project activities. The required OTEC capacity totals seven person months over the 18-month project period, with a peak during the last four months of 2002. Under OTEC's responsibilities a group of external experts assessed the conceptual framework and participated in the strategic discussions on the formulation of a Network of Excellence under FP6 (see under activity 2.2) in December. The experts were invited from OTEC's contacts (mainly Valkenburg Group). The coordination of the OTEC activities in the project was assigned to WP3, which comprised an additional responsibility.

The Time2Learn activities started in September with a kick-off on Crete. The project goals are to identify key players in e-learning technologies; define an RTD roadmap in support of optimising the life-long-learning value chain; and to propose a modus operandus for a Network of Excellence under FP6. OTEC participates as a minor partner in a number of work packages. The required OTEC capacity totals four person months over the 15-month project duration. The coordination of the OTEC activities in the project was assigned to WP3, which comprised an additional responsibility.

The E-LEN (Network of e-learning Centres) proposal, submitted under the Socrates-Minerva project, was initially submitted and rejected in 2001. In March 2002 it was however resubmitted in an extended version¹⁶ and approved, albeit with a reduced budget. Activities started in December 2002 with a kick-off on Cyprus. OTEC and the Maastricht Learning Lab together lead the work package 'Design Patterns and Roadmaps'. OTEC is responsible for the Roadmaps component and participates for about eight person months during the two-year project execution.

QUAERE (the eLIG Quality Project) was submitted¹⁷ under the e-Learning Initiative in September, headed by the e-Learning Industry Group. QUAERE is a joint project of

¹² See annex 10 for the SDL Project Document.

¹³ The proposal was submitted for the first time under call 7 of FP5. It then passed the assessment phase, but ranked too low to get funded. At the request of the Commission it was re-submitted under call 8.

¹⁴ See annex 11 for the e-LearnTN Project Document.

¹⁵ See annex 12 for the Time2Learn Project Document.

¹⁶ See annex 13 for the E-LEN Project Document.

¹⁷ See annex 14 for the QUAERE Project Document.

European e-Learning companies, academia, research institutes and end-users that aims to find a framework consensus to the question 'What is quality in e-learning and how can it be measured and certified in a way that is beneficial to all interest groups in the field of e-learning in Europe. OTEC is responsible for the organization and coordination of a so-called pre-workshop on 'Quality in learning' which involves a minor input (about one person month). There has been no outcome of the assessment so far.

4.2.2 Activity 2.2

As FP5 came to a conclusion in 2002¹⁸, it was decided the Development programme should 'Prepare for FP6'.

For the coming 4-5 years European RTD co-funding is possible under the FP6 programme. FP6 will differ from FP5 in a number of crucial ways. First the overall aim: where FP5 was directed towards involving as many European institutions and countries, FP6 is formulated in terms of strengthening Europe's global economic position. The development of a European 'knowledge society' is seen as the major instrument in this strategy. As a consequence – where under FP5 approval of a large number of small projects with as many partners as possible seemed the norm – under FP6 a limited number of large-scale, long-term projects is expected to be approved, led by a limited number of consortia comprising the major European players in their respective fields. These consortia will have substantial programmatic and financial freedom. The number of calls will be limited. The programme was planned to start by mid-2002, but eventually the first call was published in December. According to the programme outline, this will be the first and only call in 2003-2004 under FP6 for e-learning.

As described under activity 2.1, OTEC participation in e-LearnTN and Time2Learn is part of the strategy for participation in FP6. In this strategy e-LearnTN is seen as the most interesting project in terms of issues addressed from the OUNL perspective, while Time2Learn provides the most interesting mix of consortium partners from the perspective of the Commission. For eLearnTN WP3 provided extensive input to the project formulation, resulting in the lead of the most important work package. The first strategic e-LearnTN project meeting with all partners and some external advisors was held in December in Heerlen. During the 3-day meeting, the FP-6 strategy of the consortium towards the formation of an Integrated Project was outlined¹⁹.

For the Valkenburg Group, WP3 developed an Expression of Interest for FP6²⁰: Work@Knowledge²¹. The aim is to contribute to the further development of a generic open e-learning reference architecture, relevant instantiations and related business models, which will allow the development of interoperable e-learning solutions for specific European learners, organisations, and business sectors in light of the European knowledge society priorities.

¹⁸ No more FP5 calls will be published: FP5 project execution will of course continue for some more years.

¹⁹ See annex 15 for the concluding document on the eLearnTN strategy.

²⁰ The Commission invited organizations to submit EoI's in preparation of the FP6 kick-off.

²¹ See annex 16 for the Work@Knowledge Expression of Interest.

Towards the end of the year the costs and benefits in terms of staff costs for Alfanet, eLearnTN and Time2Learn were computed²². The result showed that about 80% of actual costs can be covered in these types of projects. The conclusion is that when RTD activities planned as part of the Programme agenda can be executed within these types of projects, they are extremely worthwhile.

4.2.3 Status target 2

- ❑ The eLearnTN deliverable for which OTEC is responsible is ready as a draft: it is to be submitted before the end of January 2003.
- ❑ The remaining OTEC input to eLearnTN is minimal.
- ❑ The remaining work in Time2Learn is difficult to plan due to lack of proper planning and coordination by the various WP-leaders.
- ❑ E-LEN is to start up: agreement with the Maastricht Learning Lab about our mutual participation should be clarified.
- ❑ The status of the QUAERE submission is unknown, but due to our limited input does not form a risk.
- ❑ The FP6 status is summarised under 4.3.4.

4.3 Results under target 3

To realise the target 'To prepare for the Sixth Framework Programme of the European Union' the following three activities were planned:

4.3.1 Activity 3.1

To establish a wider basis for OTEC participation in FP6 required communicating our interest in, and possible contribution to, FP6 initiatives with major European players in the e-learning field. In view of this objective, it was planned to 'Visit a number of (international) R&D events and present OTEC's body of ideas and products to international fora'.

The following R&D events were attended:

- Concertation Meeting Prometheus, Luxembourg in March 2002
- IMS Meeting, Boston in April/May 2002
- EADTU Conference, Glamorgan in April 2002
- IMS Meeting, Sheffield in August 2002
- Prometheus Conference, Paris in August/September 2002
- European Research 2002 Sixth Framework Programme, Brussels in November 2002.

4.3.2 Activity 3.2

In view of FP6 priorities and the business model underlying the Valkenburg group, it was decided to 'Build up knowledge about public-private partnerships.' This activity was tied to professionalisation of the WP3 coordinator, including the required staff input. The professionalisation trajectory did however not materialise, and thus the activity could not be carried out.

²² The projects are based on the principle of co-funding: see annex 17 for an overview of costs and benefits.

4.3.3 Activity 3.3

The lack of an institution-wide (OUNL) international strategy was identified as a major problem in WP3's annual report over 2001. It was then recommended to advise the OUNL Board to start the definition of such a strategy soonest, and for the Development Programme to 'Participate in the development of an OUNL-wide international strategy.' with a view of charting OTEC's FP6 strategy.

When preparing for FP6 – developing the Work@Knowledge EoI, deciding to participate in e-LearnTN and Time2Learn – such an institutional strategy was still not in place. Strategic and operational decisions made in WP3 thus were mainly directed by priorities of the Development programme and OTEC.

Late 2002 an additional FP6 initiative was introduced by the Board: e-Bologna. The envisioned partners largely overlapped with those of e-LearnTN, while the instrument – an Integrated Project – was also the same. With an indication of only two IP's getting approved by the Commission, this presented the unwelcome situation of the European higher distance teaching institutions developing two competing proposals: this situation emerged as a direct result of the lack of a coordinated institutional strategy.

4.3.4 Status target 3

- OTEC is actively involved in the development of an Integrated Project as a follow-up to eLearnTN.
- OTEC participates in discussions on e-Bologna.
- OTEC is on the list of potential partners for an IP and a NoE as follow ups to Time2Learn.
- The EoI for Work@Knowledge is further taken up by CETIS (member of the Valkenburg Group)

5. Staff input

	planned input	realised input
Eric Kluijfhout (whole year)	0.6 FTE	0.65 FTE ²³
Jan Beijering (whole year)	0.4 FTE	0.13 FTE ²⁴
Peter Sloep ²⁵ (as from June)	0,1 FTE	0,05 FTE

6. Conclusions and lessons learned

- The three targets for 2002 (establishing an expert network, i.e. the Valkenburg Group; acquisition of externally funded projects to strengthen programme

²³ Input based on logs of weeks 22-52, and including work done for eLearnTN and Time2Learn (initially not budgeted for): the input in weeks 1-21 was probably in the range of 0.8 FTE.

²⁴ Input based on logs of weeks 18-52: the input in weeks 1-17 was probably in the range of 0.5 FTE.

²⁵ For Valkenburg Group related tasks only.

capacity and activities; and preparing for the Sixth Framework Programme) were fully realised.

- Participation in EU projects turned out to be extremely worthwhile in terms of (re)covering staff inputs.
- Three planned activities were not realised (without directly jeopardising target achievement):
 - 'Establishing contacts with training and R&D departments of large (multi-national) companies', due to a reassessment of the relevance of this activity.
 - 'Build up knowledge about public-private partnerships', due to the fact that this activity was tied to professionalisation of the WP3 coordinator for which no time was allocated.
 - 'Participate in the development of an OUNL-wide international strategy', due to the fact that the definition of such a strategy was not initiated at an institutional level.

7. Recommendations for 2003

1. In 2003 the new Development programme will start, while a number of activities from the old programme will still continue. This is especially true for the main activities under WP3: the Valkenburg Group and running European projects. The major challenge will be to (partly) redefine and redirect these activities in such a way that they will contribute substantially to the new programme.

2. A second major challenge is the acquisition of co-funded projects, as the experiences in 2002 have shown that this is extremely worthwhile in terms of (re)covering staff inputs.

3. At a more detailed level, the following is recommended for each of the three targets realised in 2002:

- For the Valkenburg Group the most pressing issues are the definition and implementation of a work plan; the provision of the Edubox Player for testing and demonstration projects; and securing structural funding for OTEC staff input to the Group.
- With the new Development programme starting early 2003, the responsibility for the ongoing co-funded projects (eLearnTN, Time2Learn, E-LEN) should be re-allocated from WP3 to the individual project officers (as is already the case for for Alfanel).

OTEC has positioned itself favourably for the Sixth Framework Programme with the participation in two 'road-mapping and consortium-formation' projects, and the submitted Expression of Interest for the Valkenburg Group: realizing this opportunity will require close coordination during the first quarter of 2003.