EUROPEAN COMMISSION
Directorate-General for Communications Networks, Content and Technology

Data
Interactive Technologies, Digital for Culture and Education

Luxembourg,
CONNECT/G2/AS
Ares(2019)

Kimmo Koski
Managing Director
CSC-Tieteen Tietotekniikan Oy
Keilaranta 14
02100 Espoo
Finland

Subject: **Grant agreement No. SI2.488704 (ECOKT2016-1)**
Project title "CompLeap - Learner-centred digital ecosystem of competence development "
Preparatory Action: Open Knowledge Technologies: Mapping and validating knowledge
Interim review report

Dear Mr Koski,

We are writing in connection with the review procedure for your above-mentioned grant.

Following the review meeting of your project held in Luxembourg on 31/01/2019, please find enclosed the review report of the experts that examined the project for the Commission. The project implementation is currently satisfactory and the Commission has decided to allow the project to continue.

The Commission endorses the conclusions reached by the reviewers and would like to draw your attention especially to the following parts:

- 1. Overall Assessment of the review report, b. Recommendations concerning the period under review and c. Recommendations concerning future work: These recommendations have to be taken into account in the project future work. The implementation of these recommendations will be assessed in the next review, if not specified differently in the below text.

Regarding the assessed deliverables and conclusions from the Interim review meeting, the Consortium is requested to take the following actions:

1. Re-submit the deliverables: D15, D18 and D35. The deadline for the re-submission of these deliverables is **14/3/2019**. The re-submitted deliverables will be assessed in the next review meeting (estimated for M19).

European Commission, 2920 Luxembourg, LUXEMBOURG - Tel. +352 43011
Office: EUFO 01/176 - Tel. direct line +352 4301-32293
Asja.Satler@ec.europa.eu

2. The Consortium is requested to address the occurred delays and the already foreseen delays for the second reporting period. This action should include:

   Re-submission of the deliverables:
   - Deliverable D8 - Project Roadmap. Specifically, it should clearly present the operative and realistic plan of activities for the remaining next 12 months of the project, measurements (KPIs – Key Performance Indicators) for monitoring project progress, major problems expected and a detailed proposal for an amendment and internal reallocation of the budget.
   - Deliverable D14 - Risk Management Plan. D14 should be resubmitted and include a contingency plan to mitigate the delays in WP3 and reach the stated project objectives.

   The Consortium is asked to provide possible scenarios that will tackle the staffing problem of partner 2 - OPH which is causing the delays in the development of the prototype (additional subcontracting, transfer of tasks to other partners,…). The scenarios should include details regarding the: Partners affected, Work packages affected, Tasks to be transferred with corresponding deliverables, Person months, Type of costs and costs in EUR transferred, together with the detailed justification of the proposed scenarios.

   The aim of this action is to show the implementation of the project tasks and objectives until the project end on 30/11/2019.

   The deadline for submission of these documents is **28/02/2019**. The documents will be assessed by the EC and the accepted changes (scenario) will be integrated in the Grant Agreement via an Amendment.

3. Provide additional documents concerning the Development of the Beta prototype (WP3):

   - (Developing and releasing the initial version of the Beta prototype (Beta part 1) by Month 18 and the full Beta version (Beta part 2) by Month 22);
   - Detailing the criteria adopted for selecting key functionalities to be developed in the Beta version;
   - Developing a detailed plan for the piloting of the Beta prototype (WP3);
   - Developing a detailed deployment plan of the Beta prototype (WP4).

   The deadline for submission of these documents is **M18**. The documents will be assessed in the next review meeting (estimated for M19).

4. "Living documents" – reference to the Grant Agreement – Description of the Action, table 2) Deliverables, page 23: Deliverables with an open "Delivery date", for example: M6-M18:, the draft deliverable should be uploaded on the Eduuni workspace and updated regularly. Submission to the EC in the last due month.

The assessment of the use of the resources made by the experts does not imply the acceptance of the corresponding costs by the Commission.

Please note that a positive assessment of the technical work does not automatically guarantee that the costs will be accepted by the Commission. Acceptance of the costs will also depend on compliance with eligibility rules (which will be assessed separately, on the basis of your financial statements and financial audits, if any).

You may make observations on the result of the review of your project within one month of reception of this letter.

We would be grateful if you could inform the other members of your consortium of this letter.

Yours faithfully,

Asja Satler
Project Officer

Annex 1 – List of deliverables

No	Title	WP	Lead	Type	Date	Status	Comment
1	Standard management report Q1	WP1	CSC (no. 1)	Report	M3	Accepted	
2	Standard management report Q2	WP1	CSC (no. 1)	Report	M9	Accepted	
5	Standard progress report P1	WP1	CSC (no. 1)	Report	M6	Accepted	
6	Standard progress report P2	WP1	CSC (no. 1)	Report	M12	Accepted	
8	Project Roadmap	WP1	CSC (no. 1)	Document	M1-M24	**Request for revision**	To be resubmitted (see section above 1. b Recommendations)
10	Midterm report	WP1	CSC (no. 1)	Report	M12	Accepted	
12	Eduuni wiki webpage	WP1	CSC (no. 1)	Website	M1	Accepted	
13	Eduuni workspace	WP1	CSC (no. 1)	Website	M1	Accepted	
14	Risk Management Plan	WP1	CSC (no. 1)	Document	M3	**Request for revision**	To be resubmitted (see section above 1. b Recommendations)
15	Desk research	WP2	OPH (no. 2)	Document	M3	**Request for revision**	To be resubmitted (see section above 1. b Recommendations)
16	Kick-off seminar and workshops in cooperation with WP5	WP2	OPH (no. 2)	Event	M5	Accepted	
17	Task-force and WP2 meetings and meeting notes	WP2	OPH (no. 2)	Event	M5	Accepted	
18	Detailed description of the user scenarios with guidelines and advice for developers in WP3	WP2	OPH (no. 2)	Document	M6	**Request for revision**	To be resubmitted (see section above 1. b Recommendations)
19	Mid-term review seminar in cooperation with WP5	WP2	OPH (no. 2)	Event	M12	Accepted	
34	Dissemination and Communication Plan	WP5	DUO (no.5)	Document	M3	Accepted	
35	Stakeholder Management plan	WP5	DUO (no.5)	Document	M3	**Request for revision**	To be resubmitted (see section above 1. b Recommendations)
36	Project identity	WP5	DUO (no.5)	Other	M3	Accepted	
37	Project Website	WP5	DUO (no.5)	Website	M3	Accepted	

TECHNICAL REVIEW REPORT

Pilot project – Open Knowledge Technologies: Mapping and validating knowledge - CompLeap

Period covered by the report:	Period No.1, from 01/12/2017 to 31/11/2018
Place of review meeting:	*Euroforum, Luxembourg*
Date of review meeting:	31/01/2019
Experts:	Dr. Stefania Bocconi, National Research Council of Italy (CNR), Institute for Educational Technology (ITD)
	Dr. Georgios IOANNIDIS, IN2 search interfaces development Limited
Project officer:	Asja Satler (G2)

Individual report	
Consolidated report	X

1.   OVERALL ASSESSMENT

a. Executive summary

- The project has achieved some of its objectives and milestones for the period (M1-M12); however, further explanations and some corrective actions will be required.

- The project shows potential to produce relevant results, thus contributing to address a major education sector problem, i.e. developing digital mechanisms and services to support individuals' competence development as a lifelong learning process.

- During the first reporting period (M1-M12) the project has been active mostly in the planning of the first phase up to the mid of WP3- prototype development. Mainly scientific achievements have been produced, namely the *mapping framework architecture* which laid the foundation for combining or developing new services dealing with competence development. However, from what is presented in the deliverables, only designs and mock-ups prototypes have been prepared till now. A more detailed planning of key tasks and strategies for achieving the overall objective of "a learner-centered ecosystem of digital services and products" is not available. The BETA prototype will be necessary to better understand technological achievements.

- Concerning the mapping architecture described in D15, it is unclear how and why the proposed framework will help creating such ecosystem. The initial service framework and user scenarios that could help understand this, is only presented in Finnish. The integration of the presented external data sources as the backbone/backend of the ecosystem is not detailed; however, given that this integration is extremely crucial not only for achieving the final outcome, but also for the subsequent deployment, validation and testing phases in WP4, a clear and detail description (in English) is urgently needed.

- The original and stated focus on involving NEETs, immigrants and other user groups is not immediately evident; this however is part of WP4 and the validation activities, which have not started yet.

- The low quality in the deliverables and the delay in WP3 can be partly explained by the low use of resources (all partners except DUO have underspent: CSC by ~20%, OPH by ~60%, OY by ~37%, JAO by ~35%). Although the consortium claims these resources will be spent in the second year, a detailed plan for allocating not spent resources from year 1 to the remaining tasks in Year 2 is not provided.

- The information included in the submitted deliverables are very fragmented and poorly detailed (e.g D15, D17, D18); hence, beyond a mock-up demo of envisioned functionality, it is very difficult to assess the overall quality and impact of the project results so far.

b. Recommendations concerning the period under review

Concerning the work carried out in the period under review (M1-M12), several issues remained open after the analysis of deliverables. Required corrective actions are listed below:

1. **Resubmission of deliverables**. Specifically, the following deliverables should be further elaborated and detailed:
   - **Deliverable D8 - Project Roadmap.** Currently embedded in the *Eduuni* workspace, D8 needs to be resubmitted as a self-sustained document. Specifically, it should clearly present the operative and realistic plan of activities for the remaining next 12 months of the project, measurements (KPIs – Key Performance Indicators) for monitoring project progress, major problems expected and a

2

detailed proposal for an amendment and internal reallocation of the budget. This deliverable should also be considered as a living document that the consortium should periodically update.

- **Deliverable D14 - Risk Management Plan.** D14 should be resubmitted and include a contingency plan to mitigate the delays in WP3 and reach the stated project objectives. This plan should be prepared as soon as possible.
- **Deliverable D15 - Desk research.** D15 needs to be resubmitted; it only provides a table summarizing main services/products emerged from the desk research being undertaken. This deliverable needs to have more structure and look into the specific requirements, components and how they have been addressed in the literature. It is important to provide more details on current developments and make sure that the deliverable is useful on its own. Clarifications are also needed concerning which services among those listed in D15 have been considered for the architecture, what criteria were used to identify/select services in the list.
- **Deliverable D18. Detailed description of the user scenarios with guidelines and advice for developers in WP3.** D18 needs to be resubmitted and to include a well-structured presentation of how the framework architecture came up, why the selected components are part of it, how they link together, what are the basic elements of each component, which use cases they can facilitate and how the ESCO ontology has been integrated in the architecture. Information on the "Architecture bank" (mentioned in D17 p.4) should also be provided.
- **Deliverable D35. Stakeholder management plan.** D35 needs to be resubmitted since it does not present stakeholder engagement, but the generic dissemination and communication plan as described in D34. Clarifications are also needed concerning how stakeholders have been identified /selected; which/how many stakeholders for each category (among those listed in D34 and D35) are represented/involved in project task forces; which/how many stakeholders for each category (particularly NEETs and immigrants) attended the stakeholders (kick-off and midterm) seminars.

2. **Development of the Beta prototype (WP3)**. The development and submission of the Beta version of the system is particularly crucial for the successful completion of the project. Further delays could potentially endanger the overall project. The consortium should pay particular attention to the following aspects:

- *Developing and releasing the initial version of the Beta prototype (Beta part 1) by Month 18 and the full Beta version (Beta part 2) by Month 22.* This is particularly crucial to ensure sufficient time is allocated to proper testing with real users. The full Beta prototype (Beta part 2) should be developed by early September (Month 22) the latest to complete the piloting with users, as well as to allow the deployment of the system by associated partners (WP4) and to fine-tuning the system based on pilot results before the end of the project.
- *Detailing the criteria adopted for selecting key functionalities to be developed in the Beta version*. The consortium should document and describe in detail which functionalities presented in the framework architecture will be included in Beta part 1 and which additional functionalities will be developed in the Beta part 2, as well as what were the criteria adopted for selecting such functionalities. Among others, selection criteria should include: (1) functionalities reflecting/addressing the project objectives described in the Grant Agreement - Description of the Action; (2) functionalities that build upon / link to existing national services; (3) functionalities/data already present/available in the countries of Associated Partners. A clear mapping between the architecture functionalities included in the Beta versions and project objectives (as defined in the Grant Agreement- Description of the Action) should also be presented.

c. Recommendations concerning future work

1. *Developing a detailed plan for the piloting of the Beta prototype (WP3).* Specifically, the piloting plan should document and describe in details: what type of activities will be carried out; how many and what type of participants will be involved; how participants' feedback will be collected and analysed; how results from the pilot will inform the refinement of the Beta version.

2. *Developing a detailed deployment plan of the Beta prototype (WP4).* Specifically**,** the deployment plan should document and describe in details: what activities will be carried out; what

3

elements/functionalities will be deployed; what agreements will be stipulated with the partners deploying the system; what are the expected challenges to deploy the system in the national context and what strategies/corrective actions could be adopted.

3. ***Developing a case study to exploit potential synergies between CompLEAP and EUROPASS services (WP5).*** The consortium should consider the opportunity to conduct a case study to investigate and exploit the interlink between CompLeap and Europass. For example, not spent resources in Year 1 could be used to organize a 2-days workshop involving the CompLeap and EUROPASS team members to explore and identify system interface between the two services and to investigate what EUROPASS data could be made available in CompLeap. This would provide a concrete case for sustainability and a valuable opportunity for the project to effectively impact at European level.

4. ***An additional (remote) review meeting is requested between June and July 2019 (Months 19-21).*** Two weeks prior to this additional remote review meeting, the reviewers should have access to all the submitted deliverables and the beta version.

d. Assessment

☐ Excellent progress (the project has fully achieved its objectives and technical goals for the period and has even exceeded expectations).

☐ Good progress (the project has achieved most of its objectives and technical goals for the period with relatively minor deviations).

X **Acceptable progress (the project has achieved some of its objectives; however, corrective action will be required).**

☐ Unsatisfactory progress (the project has failed to achieve key objectives and/or is not at all on schedule).

4

2. OBJECTIVES and WORKPLAN

a. Progress towards project objectives

The overall objective of creating "a learner-centred ecosystem of digital services and products" seems at the current state partially achieved by means of an articulated framework architecture based on international standards.

The first objective (to study and develop an integrated and holistic learner-centred digitalised ecosystem) has not yet been achieved. There is work being undertaken with regards studying and learner-centered systems, however from the provided documentation and deliverables (D15) the level of achievement is not sufficient. It is also apparent that there has been work towards defining user requirements and the ecosystem architecture, that is though not well documented and presented.

The second objective (to tailor the functionality of this framework so that it is suitable across Europe) is aimed to be achieved though associate partners and networks; there is however little evidence of what associate partners have contributed to the project yet.

The work undertaken for achieving the third objective (to technologically build prototypes of this ecosystem) is in the mid of this reporting period; however, with regards to the development of prototypes of the ecosystem the project has still a long way to go from the current design/mock-up state that has been presented.

The fourth objective is not relevant for this reporting period.

b. Progress in individual work packages

Overall, the project has shown sufficient interaction between the work packages but integration of the work has been demonstrated only to an extent; it has not considered some of the commitments stated in the Grant Agreement-Description of the Action (GA-DoA). More specifically, there are 2 major deviations from the GA - DoA: (1) delays in the development of a working prototype and (2) limited use of allocated resources expected in Year 1 (see Recommendations above).

WP1 - Project Management (starts at M1)
The analysis of entries and activities carried out in the Eduuni workspace and the mid-term report show the effort from the project management to keep the consortium on track. Several strategies and mechanisms for supporting cooperation and communication among partners are in place (e.g. weekly meetings, webinars) though it is difficult to assess their effectiveness. Analysis of contingent risks (e.g. project running behind expected timeline) and quality control of deliverables are not sufficiently addressed.

WP2 - Requirements and architecture design (starts at M2)
The work in WP2 is loosely connected. There is little evidence that outcomes build on previous work, desk research and on each other to deliver a coherent result and make the case for a successful delivery of the objectives. It is not clearly documented how past work and achievements contribute to this project. The elaborated requirements and the presented architecture seem to be the output of project meetings and consultations, there is however little information about this. The work in WP2 was devised as the base for WP3, WP4 and WP5 and is therefore important for the project's success.

WP3 - Prototype development (starts at M6)
The principle objective of this WP is to develop prototypes to prove their practical use under real-world conditions. However, since only mock-ups prototypes of (some) envisioned functionality have been prepared in Year 1, the work in WP3 has not yet achieved a good level of progress. The Beta prototype

5

will be implemented and tested by partners. During the onsite testing phase, the partners will operate, evaluate and optimize the prototype.

WP4 - Deployment and evaluation (starts at M17)
This work package has not started yet, there is however work reported in the mid-term report on it. It is unclear though why this work is reported in WP4 and not WP2, since it is dealing with stakeholder engagement (especially associate partners) that should have contributed with use cases and requirements in WP2.

WP5 - Dissemination, communication and exploitation (starts at M1)
This work package created a basic dissemination and communication plan (D34) that could have been extended with specific actions to reach and engage stakeholders (D35 is though not giving any additional information). The communication calendar and the list of possible related events is sufficiently detailed and included in the Eduuni wiki as a live document. The current project reach seems though to be below expectations. The Project identity and website are satisfactory. Measurements (KPIs) mentioned in the Grant agreement are not detailed.

c. Milestones and deliverables

During the review period 18 deliverables have been submitted (for deliverables resubmission see above section 1.b. Recommendations).
No milestones are defined in the Grant Agreement – DoA.

No	Title	WP	Lead	Type	Date	Status	Comment
1	Standard management report Q1	WP1	CSC (no. 1)	Report	M3	Accepted	
2	Standard management report Q2	WP1	CSC (no. 1)	Report	M9	Accepted	
5	Standard progress report P1	WP1	CSC (no. 1)	Report	M6	Accepted	
6	Standard progress report P2	WP1	CSC (no. 1)	Report	M12	Accepted	
8	Project Roadmap	WP1	CSC (no. 1)	Document	M1-M24	**Request for revision**	To be resubmitted (see section above 1. b Recommendations)
10	Midterm report	WP1	CSC (no. 1)	Report	M12	Accepted	
12	Eduuni wiki webpage	WP1	CSC (no. 1)	Website	M1	Accepted	
13	Eduuni workspace	WP1	CSC (no. 1)	Website	M1	Accepted	
14	Risk Management Plan	WP1	CSC (no. 1)	Document	M3	**Request for revision**	To be resubmitted (see section above 1. b Recommendations)
15	Desk research	WP2	OPH (no. 2)	Document	M3	**Request for revision**	To be resubmitted (see section above 1. b Recommendations)

6

16	Kick-off seminar and workshops in cooperation with WP5	WP2	OPH (no. 2)	Event	M5	Accepted	
17	Task-force and WP2 meetings and meeting notes	WP2	OPH (no. 2)	Event	M5	Accepted	
18	Detailed description of the user scenarios with guidelines and advice for developers in WP3	WP2	OPH (no. 2)	Document	M6	**Request for revision**	To be resubmitted (see section above 1. b Recommendations)
19	Mid-term review seminar in cooperation with WP5	WP2	OPH (no. 2)	Event	M12	Accepted	
34	Dissemination and Communication Plan	WP5	DUO (no.5)	Document	M3	Accepted	
35	Stakeholder Management plan	WP5	DUO (no.5)	Document	M3	**Request for revision**	To be resubmitted (see section above 1. b Recommendations)
36	Project identity	WP5	DUO (no.5)	Other	M3	Accepted	
37	Project Website	WP5	DUO (no.5)	Website	M3	Accepted	

d. Relevance of objectives

The project objectives and approach for the coming period are still appropriate and achievable within the time and resources available to the project. However, detected deviations should be promptly considered and managed properly through adequate corrective actions as described above (See section 1 – Overall Assessment).

3. RESOURCES

a. Assessment of the use of resources

The resources used are appropriate for the work delivered. However, the work delivered is only a part of the work foreseen to be concluded in the reporting period.

OPH greatly underspent its planned resources (currently at ~38% of forecasted budget). The engagement and involvement of adequate staff is critical for success of the project, considering this partner has the most person months.

Underspending also incurred to all other partners (CSC at ~80% of the forecasted budget; OY at ~63% of the forecasted budget; JAO at ~65% of the forecasted budget) except DUO.

Internal reallocation of not spent budget should be supported by a clear and detailed description of the correlation between the tasks performed and the expected costs, and motivations for budget allocation.

7

b. Deviations

The underspending of OPH is critical for the successfully delivery of the project outcomes. This partner has overall 20 person months in WP2 (M2 to M22) and 40 person months in WP3 (M6 to M18), leading both work packages (requirements, prototype development). The partner has an additional subcontracting budget of 350K€ which is stated to be used for "procurement of IT services, such as UI-design" of which only 35K€ have been allocated in this reporting period. Urgent action and attention to the effort and work planned in this project is required to be able to achieve the objectives as presented in the Grant Agreement - Description of the Action.

8

4. MANAGEMENT, COLLABORATION AND BENEFICIARIES' ROLES

a. Technical, administrative and financial management of the project

The management is professional. However, risks should be carefully monitored, identified and mitigated and the risk management activities that appeared during the project implementation should be properly reported. The quality of deliverables (i.e. documenting in more detail the process and the main results achieved) is poor and should be further increased.

b. Collaboration and communication

The partnership is strong, well balanced, and shows a positive level of cooperation and collaboration. However, the work performed in not fully aligned with the work as scheduled in the GA-DoA (as detailed in Section 1- Overall assessment).

c. Beneficiaries' roles

It is not evident that there is lack of commitment, it is however evident that there is massive underspending for OPH. This might be due lack in competences and staff.

9

5.   USE AND DISSEMINATION OF FOREGROUND

a. Impact

At the current state, the impact of the project is low. It has not demonstrated any significant achievement, except some designs and mock-ups.

b. Use of results

Not applicable yet.

c. Dissemination

There is adequate dissemination being carried out (as listed in the WP5 section of events in Eduuni). The project website is appealing and the information there consistent. More effort is needed to reach a European audience.

d. Involvement of potential users and stakeholders

Efforts to involve users and stakeholders have been planned. There were some workshops for acquiring associate stakeholders and the project managed to motivate 3-4 organisations to support the project. It is however difficult to assess at the current state, their commitment and their contributions.

e. Links with other projects and programmes

Not applicable / evident.

SI2.488704 (ECOKT2016-1) - CompLeap

6. OTHER ISSUES

Not applicable / evident.

Name(s) of expert(s):		
	Stefania BOCCONI	Georgios IOANNIDIS
Date:	18/02/2019	18/02/2019
Signature(s):		