



The Wikirate Project

► Q1 Progress Report

Vishal Kapadia ► Wikirate e.V. ► 18/03/2014

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Executive Summary

The Wikirate Project kicked off, officially on 1st October 2013. There was, however a delay in receipt of funding, which was fully received by all partners by mid November.

This delay had a knock on effect in terms of the abilities of some of the partners to fully perform their tasks; especially when the cleared balance was required to recruit key personnel, as was the case for one of the project partners (Cambridge University).

In general though, the project has benefitted from a strong start with regards to tasks in WP1, WP2, WP5 and WP8. Hence we have seen the Project Management flow set up, and a successful kick off meeting. Significant progress has been made with respect to the architecture, testing and initial development work priming Wikirate.org for its first release in month 6; as well as getting with both the **project website**¹ and internal **docs**² website up and running on European servers.

¹ <http://www.wikirate.eu>

² <http://docs.wikirate.eu>



Dissemination efforts were kicked off with social media presence established and thoughtful metrics of approach for how to approach first users and understand their needs. Both Wagn e.V. and Wikirate e.V. were disseminated further at a CAPS FLOSS Concertation in Madrid.

WP3, WP6 and WP7 were affected by the delayed funding, due to the lack of ability to recruit a researcher, UX developer and Senior Software Engineer; who would carry the responsibility to carry out the tasks in these work packages. This was due to processes at Cambridge University, which would not allow advertising to commence for the positions prior to receipt of funds; and then there was due process in terms of receiving applications and interviewing candidates. As of month 3 these positions were being advertised across various channels but none of the positions were filled. In the meantime, for WP3 a contractor was hired to start work between Ahref and Cambridge on personas building; which contributes to initial agile site development.



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2 Objectives for the period

2.1 First quarter objectives

Our objectives for the Wikirate Project for the first quarter were mainly around onboarding team, connecting partners and achieving the necessary technical progress, by which the project could subsequently reach out to potential users in preparation for the Month 9 Milestone of the first Beta launch of <http://wikirate.org>.

An additional objective of this quarter was to understand how partners could work together to achieve the shared objectives of the project; and to initiate best practices for collaboration both online and offline at the appropriate periodical intervals between project contributors.

2.2 follow up of previous review

Not applicable.

3 Work Progress and achievements during the period

3.1 Progress overview and contribution to the research field

The progress of work in the first quarter of the project experienced the greatest leaps in terms of technical development, and architecture as well as dissemination strategy.

Within WP2 great strides were made within the back end of both Wagn and Wikirate.org to improve functionality to future user base. This was complemented by activities in WP8, refining the product, whilst understanding the dissemination challenges which must be addressed.

Due to hiring delays and the relative early stage of the project, within the first 3 months there were no concrete research achievements to speak of; however paths have been set to ensure that research objectives will be achieved.



3.2 Work Packages Progress

3.2.1 WP2: Interactive Design

| Work Package(s) contributed to: | Tasks worked on | Any problems faced | Key Outcomes | Additional Notes |
|---------------------------------|-----------------|--------------------|---|------------------|
| WP2 | T2.1 | None | Set up user story management tools; created simple user personas; generated and refined user stories/ epics for claim creation and analysis navigation; identified prohibitive complexities, including ontological issues (Topics hierarchy, Markets organization, etc) and process issues (eg requiring that users must add sources before adding claims); designed “early-adopter” solutions for these problems | |
| WP2 | T2.2 | None | Translated User stories from T2.1 into technical solutions ranging from website configuration (“wagneering”) to mod development to improvements to the Wagn platform. | |
| WP2 | T2.3 | None | Designed improvements to code organization to improve modularity, support more complete automated testing, and promote code re-use. Designed re-organization of wikirate modules into multiple files. | |

T2.1 User requirements

Grass Commons: Our Q1 priority for this task has been to specify user requirements that can be implemented immediately in service of creating a usable if minimalist version of Wikirate.org that will suffice for early adopters to begin creating content and developing community together.

The building block of all wikirate content is the “Claim,” a sourced statement about company behaviors of social impact. Our central challenge in Q1 was to create an *understandable* and *enjoyable* user experience for creating and navigating claims.

Prior to the grant’s start date, the wikirate.org prototype made claim creation technically possible but challenging even for experienced users. Users found it difficult to understand the



definition of claims and sources and the process for creating a well-sourced claim required edits on many separate webpages.

Before November's Kickoff Huddle, the website was simplified considerably by *redefining and simplifying how claims are sourced*. In short: all claims must have a source, and all sources must have a valid url. The claim must cite at least one webpage, and Wikirate.org can track information specific to the single source page or to the entire source cite, which is auto-detected from the url.

At the Huddle, the broad response was that the process of creating a claim had been made *understandable*, but not *enjoyable*. The process, as it stood, was to create a source record, followed by a claim based on that source. Each step required completing many fields (market, company, topic, etc). Some of these fields were quite complex, most notably the topics field, which required navigating an extensive topics hierarchy.

In response to the Huddle feedback, the process of creating a claim was redesigned and distilled to just three fields on a simple form: the claim statement, the source link, and tags. This form submission would lead to the creation of a valid, sourced claim when can then be further clarified by the current user or other community members.

After claim creation, the next most emphasized area of focus for user requirements was navigation. Here emphasis was given to making it easy to find the companies and topics about which most claims were made and to ensure that it is easy and enjoyable for users to explore claims related to each area.

As we were able to create an initial sample of claims, we were also able to begin specifying the user experience for creating claim summaries, which may be attached to companies, topics, or intersections of the two (which we have termed "analyses"). In Q1 we gave particular focus to specifying citation requirements, which will connect a data quality pipeline in which summaries cite claims and claims cite external sources.

As specified in the DOW, The Wikirate Project consortium is using Pivotal Tracker to track and refine requirements for the Wikirate.org user community. Pivotal Tracker organizes user requirements into "stories", which themselves can be organized into larger-scale "epics". In Q1, we introduced collaborators from all partner organizations to Pivotal Tracker and used the tool for prioritizing, implementing, and projecting completion of development tasks.

Wikirate.org's users stories are told from the perspective of "Personas" that are developed to reflect and reinforce key characteristics of typical wikirate users. A first round of personas developed by Grass Commons and Wikirate e.V. was based solely on the depth of user interaction with the site (Nigel the Newbie, Edith the Editor, etc). At our Kickoff Huddle,



AHREF led the team through exercises to begin developing personas that more deeply embody the psychographic profile of users. After the Huddle, AHREF initiated bibliographic research into a broader swath of likely Wikirate.org users. This research will be distilled into usable personas and scenarios in Q2.

T2.2 Technical requirements

Grass Commons: At the heart of this task is translating user stories (T2.1) into operable technical plans. In general our technical solutions can fall into one of three areas:

1. Wagneering, or site configuration, in which solutions may be implemented on the site itself using Wagn's existing capacities.
2. Wikirate mod development, in which Wagn is extended with custom "mods" for the Wikirate.org site
3. Wagn core development, in which the Wagn core must be enhanced in service of Wikirate user requirements.

In Q1, all the stories described above (section 2.2.1) were reviewed by Grass Commons. Technical requirements were then outlined in Pivotal Tracker, and the difficulty was assessed using that tool's "points" system. Wikirate e.V. would then use these points in determining the stories' priority.

In the case of Wagneering requirements, the task might be assigned to members of Wikirate e.V. who have gained expertise in the Wagn tool. In the case of Wikirate mod development and Wagn core development, the tasks were assigned to Grass Commons. (See WP6 for implementation discussion)

T2.3 Conceptual architecture and functional design

Grass Commons: The central focus on this task in Q1 was code organization, specifically in relation to the relationship of Wikirate mods to the Wagn core.

For context, at the time of writing Wagn is at release version 1.12.6. The mods API, the mechanism for extending and customizing Wagn's behavior, is the central focus of Wagn 2.0. At the time when the grant started, the API was already *functional*, but substantial work remained before it could be said to be *complete*. For example, all existing mods comprised a single file, and none of them were supported with automated tests.



These key areas of technical requirements (T2.2) drove effort on this task:

1. The need for extensive technical customization of the claim creation process (eg, auto-detecting websites, recognizing existing source pages, etc) quickly demonstrated the need for all Wagn “events” (data changes triggered by creating, updating, and deleting cards) to be fully exposed to the mods API. This would allow Wikirate to do things like create a *source* while in the process of creating a *claim* card.
2. The quantity of these customizations showed the need to provide mechanisms to organize mods into multiple files.
3. The complexity of these customizations forcefully made the argument that we would need support for automating mod testing.

To address the need to make all data events customizable by Wikirate, Grass Commons designed solutions to expose all such events to the mods API.

To address the mod organization need, Grass Commons designed enhancements to the process by which mods are loaded as well as a scalable organizational scheme for Wikirate’s modifications.

To address the automated testing need, Grass Commons raised the priority on its long-held plan to begin distributing Wagn code as a “gem” via rubygems.org. (Note that source code will still be maintained on GitHub as before.) This new distribution mechanism will allow for the necessary code separation to allow separate rspec testing stacks for Wikirate and Wagn code. It also has the following benefits for the Wagn community:

- easier installation
- easier code maintenance, thanks to dependency tracking
- simple to host multiple wagns on a single server
- reliable, visible tracking of usage via downloads data
- easier to find, because rubygems is a trusted resource for exploring and using ruby libraries

Grass Commons laid the conceptual groundwork for releasing Wagn as a gem in Q1 and expects to release it formally via this mechanism beginning in Q2, at which time it will also develop unit tests for existing Wikirate mods using rspec.



3.2.2 WP3: User & Community Dynamics

| Work Package(s) contributed to: | Tasks on worked | Any faced problems | Key Outcomes | Additional Notes |
|---------------------------------|-----------------|--|---|------------------|
| WP3 | T3.1 | Late start of project led to delayed recruitment | Post of Research Associate advertised. Temporary staff appointed to cover some of these activities in the interim | |
| WP3 | T3.5 | None | Designed and set up initial “blank slate” community areas for discussing and designing policy and resources | |

Delays in the signing of the contract have meant that Cambridge were unable to advertise for three posts (Research Associate, Senior Software Developer and UI/UX Software developer) until December. Normal procedures for filling new posts were applied by the Cambridge Human Resource Department. The closing dates for the advertisements were the end of December. Interviewing will take place once applications are received. This has delayed the implementation of all the tasks for which Cambridge is responsible and will inevitably have an impact on other tasks,

Cambridge: hosted the first meeting of the Wikirate team during a three day event in November where project team members got to know each other and discussed and agree strategies and procedures for future work.

Discussions have been held concerning workarounds and additional human resources have been recruited to address gaps that result from the delayed staff appointments. We have employed a qualitative psychologist on a consultancy basis to work with ahref on various aspects of WP3, including the preparation of an outline and bibliography following a review of the literature. More such temporary appointments are anticipated as part of the catch up process.



T3.5 Design of Community Places and Governance Aspects

No activity reported

3.2.3 WP4: Corporate Social Responsibility (CSR) Ratings

NA: Work Package commences from month 12

3.2.4 WP5: Scalable Analytics for User Contributions

| Work Package(s) contributed to: | Tasks on worked | Any faced problems | Key Outcomes | Additional Notes |
|---------------------------------|-----------------|--------------------|---|------------------|
| WP5 | T5.1 | None | Preliminary requirements, Visual Index Service | |
| WP5 | T5.2 | None | Initial repository for corporate information, First plans on REST interface | |
| WP5 | T5.3 | None | SoA on emerging topic detection, Minor technical decisions for interconnecting CERTH and Grass Commons software | |

T5.1 Duplicate Detection

CERTH: Completed a preliminary requirements analysis for the use of duplicate detection features in conjunction with the Wagn infrastructure and system architecture. Visual Index Service is setup and running in <http://mkab2.iti.gr:8080> according to the REST interface which is defined in that task as well. Demo collection for testing purposes is created. Indexing and



searching of duplicate images is the first “hand-shaking / hello world” method to be used by the Wagn system in the next development phase. Once the image data are available, compact image descriptors are extracted, based on the VLAD+SURF descriptor-aggregator combination.

Cambridge: The partner reported no activity.

T5.2 Entity-centric indexing and annotation recommendation

CERTH: An initial repository to gather corporate information is setup. For the indexing service, entities are taken as input. First implementation concerns only standalone client and the service is not yet connected with the Wagn system. Some first plans on the REST interface for the entity-centric indexing are performed.

Cambridge: The partner reported no activity.

T5.3 Emerging topic detection and visualization

CERTH: The main focus was mainly the gathering of various best-practices and state-of-the-art techniques and an attempt to build a common technical view on emerging topic detection and visualization with the other partners.

Cambridge: The partner reported no activity.

Grass Commons (Year I): Updated the Wagn’s file documentation with extra context about file storage. Correlation of the public URL of a media (e.g. image) with the file structure will not be taken into account for CERTH’s services due to possible future changes in the internal representation in Wagn. Instead, after discussion, it is decided that the “revision_id” will be used instead of the URL for indexing and other purposes concerning the interconnection of Wagn’s claims/cards with the CERTH’s indexing services. Grass Commons and CERTH agreed to use <http://dev.wikirate.org> to start connecting / debugging their software.



3.2.5 WP6: Wikirate Architecture and Development

| Work Package(s) contributed to: | Tasks on worked | Any problems faced | Key Outcomes | Additional Notes |
|---------------------------------|-----------------|--|---------------------------------------|------------------|
| WP6 | T6.1 | Late start of project led to delayed recruitment | Software development posts advertised | |
| WP6 | T6.2 | Late start of project led to delayed recruitment | Software development posts advertised | |
| WP6 | T6.3 | Late start of project led to delayed recruitment | Software development posts advertised | |

T6.1 Implementation of Features of WP2 and integration of WP5

Grass Commons: fluid fulfillment of all the pre-kickoff user requirements (t2.1) and beginning of work on the post-kickoff requirements (still t2.1) after they'd been translated into technical requirements (t2.2)

Cambridge: The partner reported no activity

T6.2 Improvements to Wagn platform

Not wp leader, but I would mostly point to the t2.3 needs. I would emphasize that the first two subtasks mentioned there were completed and the third was begun.

Cambridge: The partner reported no activity

T6.3 Wikirate system administration



Cambridge: researched and recommended a place to host the sites <http://wikirate.eu> and <http://wikirate.org> on European servers

Wikirate e.V.: registered, bought two servers

Grass Commons: set up server accounts; got wikirate.org, dev.wikirate.org up and working (as well as the other sites); automated backup for wikirate.org.

3.2.6 WP7: Evaluation

NA: Work package commences from month 12.

3.2.7 WP8: Dissemination and Exploitation

| Work Package(s) contributed to: | Tasks worked on | Any problems faced | Key Outcomes | Additional Notes |
|---------------------------------|-----------------|------------------------------|--|------------------|
| WP8 | T8.1 | None | Social media presence on Facebook, Twitter and LinkedIn; First draft of dissemination plan | |
| WP8 | T8.2 | None | Website maintenance & hosting Promotional material Project presentations | |
| WP8 | T8.3 | Delay in product development | Communication with existing users | |
| WP8 | T8.6 | None | | |

T8.1 Specifications and Implementation of Dissemination plan for Wikirate

WIKIRATE: Social media presence of Wikirate.org has been established on Facebook (<http://www.facebook.com/wikirate>), Twitter (@wikirate) and LinkedIn (<http://www.linkedin.com/company/wikirate>). The first draft of the dissemination plan has been reviewed internally within Wikirate, but has not been shared with the PMB.



T8.2 Dissemination support tasks

WIKIRATE: Project presentations have been created for the project kick-off event in Cambridge (November 2013) and the workshop on free/open source distributed platforms for peer production organized by P2P Value in Madrid (December 2013).

T8.3 Wikirate community creation & maintenance

WIKIRATE: Existing users have been reached out to via e-mails to inform them about the status quo of the project. New users have not been actively approached due to delay in product development.

T8.4 Stakeholder communications

Wikirate: Attended a CAPS Concertation in Madrid hosted by P2P Value partners in December to disseminate and discuss wagn software and Wikirate.org

T8.5 Exploitation Plan

No activities on this task

T8.6 Exploitation of Wagn software and establishment of a European WAGN centre

Grass Commons: wrote articles of incorporation



3.4 Deliverables and Milestones tables

3.4.1 Deliverables Table

| Del. No. | Deliverable Name | WP no. | Nature | Delivery date from Annex I (proj month) | Actual / Forecast delivery date | Comments |
|----------|---|--------|--------|---|--|--|
| 1.1.1 | Project Management Handbook | 1 | Report | 2 | Actual: 20/12/2013 Forecast: 30/11/2013 | |
| 1.1.2 | Periodic Project progress reports | 1 | Report | 3 | Actual: 18/03/2014 Forecast: 31/12/2013 | Delayed submission due to project kick off delay |
| 2.2.1 | Specification of Quarterly Priorities | 2 | Report | 3 | Actual: 18/03/2014 Forecast: 31/12/2013 | Delayed submission due to project kick off delay |
| 3.3.1 | Interim Report on User & Community Dynamics | 3 | Report | 3 | Actual: 18/03/2014 Forecast: tbc | Delayed submission due to project kick off delay. Lack of resource indicates significant delay. Interim deliverable will be prepared in month 6. |
| 8.8.1 | Dissemination Plan for Wikirate | 8 | Report | 3 | Actual: 18/03/2014 Forecast: 31/12/2013 | Delayed submission due to project kick off delay |
| 8.8.2 | Project Website | 8 | Report | 3 | Actual: 18/03/2014 Forecast: 31/12/2013 | Delayed submission due to project kick off delay |



3.4.2 Milestones table

| Milestone no. | Milestone name | Means of verification (from Annex I) | Delivery Date from Annex I | Achieved Yes/No | Actual / Forecast achievement date | Comments |
|---------------|--------------------------|--------------------------------------|----------------------------|---------------------------------|--|---------------------------------|
| MS1 | Kick off meeting | | 1 | Yes | Actual: 20/11/2014 Forecast: Month 1 from Annex | Delayed due to delay in funding |
| MS2 | Wikirate.org Beta 1 | | 9 | Not applicable for this quarter | | |
| MS3 | Wikirate.org Beta 2 | | 18 | Not applicable for this quarter | | |
| MS4 | Wikirate.org Full Launch | | 27 | Not applicable for this quarter | | |



4 Project Management

4.1 Management Activities

4.1.1 Consortium management tasks and achievements

WP1: Project Management

| Work Package(s) contributed to: | Tasks worked on | Any problems faced | Key Outcomes | Additional Notes |
|---------------------------------|-----------------|--------------------|--|------------------|
| WPI | T1.2 | None | Project management Handbook delivered; kick off meeting executed and work flows established; | |

T1.1 Financial Coordination

This task's objective is the preparation of the financial administration of the project and the financial interaction with the EC. In this context, CERTH has received the pre-financing from the Commission, which has been distributed to the beneficiaries. CERTH provided input to the deliverable D1.1.1 Project Management Handbook, regarding the general project organisation and information management. CERTH has also helped in defining the technical and financial reporting procedure.

T1.2 Consortium Management

Wikirate: Organised kick off meeting activities; setting up workflows and project management tools; prepared materials for kick off meeting; connecting with partners establishing relationship

Wikirate: Produced Project management handbook; assessed and agreed workflows;

Wikirate: Helped Cambridge facilitate hiring process with active input into job advertisements and dissemination of adverts



Problems, which have occurred

The greatest challenge this quarter was in managing the fallout from the delay in receipt of funds for some partners. Some of whom required the cleared funds to commence their hiring processes. This has affected the hiring of 3 full time equivalents who would have been working on the project from Cambridge University; one UX designer/developer, one senior software engineer and one researcher. Subsequently this has impacted the ability to complete deliverable 3.3.1 as well as leaving a quite reduced development team; working at full capacity to hit targets.

Steps have been made by Cambridge to push forward recruitment with adverts posted and initial invitation to interview conducted at the end of this quarter; which we hope will fill the gaps sooner, rather than later.

List of meetings

| Meeting type | Date of meeting | Venue | Attendees |
|-------------------------|-----------------|-------------------------------|---------------------------------------|
| Kick off meeting | 20/11/2014 | Madingley Hall, Cambridge, UK | All project partners were represented |

Coordination activities

The main coordination activities established were those between partners within the consortium. Most notably there was strong exchange at the kick off meeting between the team at Ahref, Grass commons and Wikirate e.V. about the way to approach user centric development and marketing through use of personas to create user stories; upon which agile development could take place.

Data connections between the site and its needs; especially with regards to collective intelligence needs of the platform, were also established.



4.2 Quality and risk management

Quality and Risk management of Deliverables

The coordination team has taken strong steps to ensure quality in terms of the submission and review of deliverables to the commission. Each deliverable is submitted to the co-coordinator and undergoes an internal review process to gain consensus among partners; as well as review by one partner not directly involved with the deliverable prior to submission. After this internal review, successive reviews are undertaken until the deliverable is considered ready for submission.

Quality and Risk management for Project work

Further to the deliverables review process, we have agreed on the use of a number of common project tools, which allow us to maintain efficient communication flow between partner locations as well as sufficient space for interaction around points of difficulty within collaborations.

Project tools we have set up include Pivotal Tracker (<http://pivotaltracker.com>) as well as the internal project admin website, hosted at <http://docs.wikirate.eu>, which provides a space for all project partners to collaborate and document activities.

Partners also benefit from free video calling via google hangouts and skype calls; to get the feel of more interconnected offices, despite the physical distances between project partners.

4.3 Dissemination and use of the knowledge

Due to the early stage of the project little research dissemination was possible this quarter, or indeed next quarter. There will be a CSR forum, which is expected to occur in month 6 of the project; where Wikirate will ideate with high-level stakeholders deeply concerned with CSR, in London.

The project website will be hosted at <http://wikirate.eu> and should be the central repository to track dissemination of research and events related to The Wikirate Project.



5 Resource per WP and Partner

5.1 Resource table per WP

| Partner | | WPI | WP2 | WP3 | WP4 | WP5 | WP6 | WP7 | WP8 | Sum |
|------------|---------------|------|------|------|-----|------|------|-----|------|-------|
| 1 | Cambridge | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 | Ahref | 0 | 0 | 0.44 | 0 | 0 | 0 | 0 | 0 | 0.44 |
| 3 | CERTH | 0.26 | 0 | 0 | 0 | 0.70 | 0.14 | 0 | 0 | 1.10 |
| 4 | Grass Commons | 0 | 1.37 | 0.08 | 0 | 0 | 1.43 | 0 | 0.30 | 3.18 |
| 5 | Wikirate | 1.73 | 0.19 | 0 | 0 | 0 | 0 | 0 | 4.72 | 6.63 |
| Sum | | 1.99 | 1.56 | 0.52 | 0 | 0.70 | 1.57 | 0 | 5.02 | 11.35 |

Table 1: Resource table per Work Package for the reporting period

5.2 Resource table per Partner

| Partner | | Quarter I | Sum |
|------------|---------------|-----------|-------|
| 1 | Cambridge | 0 | 0 |
| 2 | Ahref | 0.44 | 0.44 |
| 3 | CERTH | 1.10 | 1.10 |
| 4 | Grass Commons | 3.18 | 3.18 |
| 5 | Wikirate | 6.63 | 6.63 |
| Sum | | 11.35 | 11.35 |

Table 2: Resource table per Partner for all of the reporting periods



6 Conclusions

Q1 saw some bumps in the road with the unavoidable hiring delays affecting Cambridge's ability to hire promptly at the start of month 1. However, with respect to the Wikirate.org site; and technical architecture, a great deal was achieved with simplification of the 'make a claim' process as well as progress on other technically important challenges such as navigation through the site and around the core functionality.

In complement to this, dissemination analysis in WP8 has laid the groundwork for a coherent and segmented approach to initial user base, which should in concert with site development set The Wikirate Project in good stead to hit its first milestone targets in month 9.