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PART 1

51st eucen Conference | University of Aveiro, 05-07 June 2019
“University Lifelong Learning to live a better life – Continuing Education for Sustainable Quality of Life in Europe”

PUBLIC SECTOR-UNIVERSITY COOPERATION: MOOCS ON ENVIRONMENTAL AUDITING

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INTRODUCTION

MOOC is an acronym for "massive open online course" and it denotes free online courses, which do not have restrictions on registration, being designed for large numbers of learners. 2012, when several well-financed MOOC providers associated with top universities emerged, has been called "the year of the MOOCs" by the The New York Times (Pappano, 2012). A large number of world leading universities offer MOOCs now: in 2018, 900 universities offered MOOCs for 100 million learners (Shah, 2018).

The University of Tartu started to develop MOOCs in the beginning of 2014 and has since implemented 27 courses (see the list of University of Tartu's MOOCs at <https://moocs.ut.ee/>). Between 2014–2018, 31,256 participants have taken part in University of Tartu MOOCs and the average completion rate has been 52.2%. The purposes for the development of MOOCs have been to ensure free access to higher education for different target groups, to introduce the University of Tartu curricula in English, to promote the possibility of studying at the university to potential learners, and in the broadest sense to serve society.

Massive open online courses can also be used in degree education, embedded within a course, whether by taking the MOOC during the period of study or using a previously passed MOOC via recognition of prior learning. Teachers have pointed out that participants in MOOCs have a more diverse educational background than traditional students and they often work in the field. Based on these students' active participation, questions and feedback, the teachers have an invaluable opportunity to improve their learning materials (which they also use in their subject courses) with new perspectives. In this way, MOOCs also contribute to improving the quality of learning and to supporting the learning process in degree programs.

NEED FOR TRAINING

Supreme audit institutions from all over the world engage in the assessment of environmental tools and policies implemented by their governments and public authorities. The National Audit Office of Estonia has extensive experience in environmental auditing, and for over 10 years has been steering the activities of international working groups on environmental auditing. MOOCs are a cost-effective way to share this expertise with peers from around the world as well as with non-auditors interested in public-sector environmental policies.

Since 2016, the University of Tartu and the National Audit Office of Estonia have jointly developed and implemented three MOOCs on environmental auditing: "Introduction to Environmental Auditing in the Public Sector", "Auditing Environmental Impacts of Infrastructure" and "Auditing Water Issues" (under the aegis of the EUROSAI Working Group on Environmental Auditing (WGEA)). The fourth course, "Auditing Waste Management" is under development and is based on the practice of several supreme audit institutions from around the world that collaborate within the environmental audit working group of the International Organisation of Supreme Audit Institutions (INTOSAI WGEA).

The National Audit Office of Estonia chose the University of Tartu as a partner in developing and implementing MOOCs because of the university's extensive experience and technical and pedagogical competence in implementing e-learning and MOOCs.

OVERVIEW OF THE COURSES

The first MOOC, “Introduction to Environmental Auditing in the Public Sector“, has been designed to give learners an overview of basic environmental management principles and the methods of public sector environmental performance auditing. After the course, the successful learners will better understand the importance and complexity of the concept of sustainable development, know the common governance tools that are used in environmental management, and be familiar with the common steps in the audit cycle, including an audit design matrix and the process of reporting and communicating audit results.

Learning module for this course is available at: <https://sisu.ut.ee/env-intro>

The second MOOC, “Auditing Environmental Impacts of Infrastructure“, focuses on the public sector audit of infrastructure projects from an environmental and sustainability perspective. Participants learn about the importance and scale of environmental and sustainability impacts arising from infrastructure development. The course covers main governance tools and methods that are used for managing the environmental impacts of infrastructure. Those who pass the course successfully will be able to plan a performance audit addressing the environmental and sustainability impacts of infrastructure, including the formulation of audit questions and criteria.

Learning module for this course is available at: <https://sisu.ut.ee/env-infra>

The third MOOC, “Auditing Water Issues“, concentrates more specifically on the management of water resources, again from the viewpoint of auditing the environmental and sustainability impacts. Learners passing this course will understand the importance and scale of environmental and sustainability impacts arising from water issues and can draft and analyse performance audit design matrixes addressing the environmental and sustainability impacts of water issues. They know the legal framework and main governance tools that are used for water management.

Learning module for this course is available at: <https://sisu.ut.ee/water>

The MOOC “Auditing Water Issues“ consists of examples of audit cases based on the practice of several Supreme Audit Institutions from the European Organisation of Supreme Audit Institutions (EUROSAI) region. Supreme Audit Institutions from the following countries contributed to developing the MOOC: Albania, Austria, Belgium, Bulgaria, Cyprus, Estonia, Finland, Lithuania, Malta, the Former Yugoslav Republic of Macedonia, the Netherlands, Slovenia, Turkey.

The credit value of each course is 26 hours (1 ECTS).

LEARNING PLATFORMS

For the technical implementation of the MOOC study materials the website and learning module building platform Sisu@UT (<https://sisu.ut.ee>) is used.

Sisu@UT has been developed on the basis of a free open source OpenScholar software project at the University of Tartu and is designed to create websites related to teaching and research at the university. It is a user-friendly tool for compiling learning modules, learning objects, and personal or project websites. All university staff that have a university computer network ID can use the platform.

Sisu@UT has received very positive feedback from its users especially with regard to the free open source software, which enables a user to add and change interactive features online inside the same web site / learning module. It makes the management of learning modules easier and less time consuming than other similar offline tools or online tools that do not enable interactive elements (Pilt, Tartes, Marandi, 2014).

The MOOCs are managed in the university's Moodle environment (<https://moodle.ut.ee>).

The University of Tartu has been using the Moodle environment since 2009 and uses it for both degree education and continuing education courses, MOOCs included. In 2018, 48.2% of continuing education learners (18,934 learners) participated in partially or totally web-based courses. The added value of using Moodle is the data exchange with the Study Information System (SIS), which facilitates the registration of participants and the issuance of certificates. Using the same Moodle environment to run MOOCs allows the university to save on development and administration costs.

Learners register for the course in the university's Study Information System (SIS) using the link provided in the course description. The learners' data is automatically transferred from the SIS to Moodle. Their usernames and passwords for Moodle are also created automatically and a notification about it is sent to the learner.

The learners' data is updated automatically every night or manually whenever necessary. It is also possible to automatically transfer learners' results from Moodle to SIS, where the completed learners report is finalised.

INSTRUCTIONAL DESIGN

The main components of the courses are: course description and study guide; instructions; communication tools (e.g. forums); links to study materials, activities and assessments (quizzes, discussions); and a feedback survey about the course and the learning environment.

The digital study material package supports the achievement of learning outcomes by being well structured, instructive, illustrated, interactive, giving automatic feedback, and being suitable for independent learning for learners with different learning styles. The learning materials package includes content (text, pictures, animations, videos up to 10 minutes), learning activities, tips for auditors, case studies, thinking exercises (see Figure 1), and self-assessment to evaluate the achievement of learning objectives (see Figure 2). Videos are provided with subtitles.



THINKING EXERCISE

What are three major pressures related to water in your country?

Mark all activities that have an impact on surface water:

☐ Emissions from a wastewater treatment plant

☐ Salt water intrusion

☐ Creating a dam on a river

☐ Using water from a lake for irrigation

☐ Water abstraction from wells

☒ Check

Figure 1: Thinking exercise in learning materials created with H5P tool (<https://h5p.org>)
<https://sisu.ut.ee/water/book/11-pressures-affecting-good-status-water>

Exercise 1

1. Indicate which of the following can exert pressure on the good status of water.

Choose

<input type="checkbox"/>	Wetlands
<input type="checkbox"/>	A chemical plant
<input type="checkbox"/>	Insufficient sewage treatment
<input type="checkbox"/>	Aging population
<input type="checkbox"/>	Mining
<input type="checkbox"/>	Evaporation
<input type="checkbox"/>	Fertiliser applications
<input type="checkbox"/>	Insufficient water distribution networks
<input type="checkbox"/>	Inadequate water pricing

2. Identify what type of pollution is linked to each situation described below:

The lake has suddenly turned green	<input type="text"/>
Coliform bacteria were found in water samples	<input type="text"/>
High mercury levels have been detected in fish	<input type="text"/>
An accident at the chemical factory located by the river resulted in a spill	<input type="text"/>
90% of people in village X are down with diarrhoea, fever and stomach pain	<input type="text"/>
The use of fertilizers by farmers has increased significantly	<input type="text"/>

Figure 2: Self-assessment exercise at the end of study module <https://sisu.ut.ee/water/water>

During the four-week course period the work is organized using the Moodle online environment. All registered participants receive information on how to access Moodle and how to work in it. For every week a set of tasks is given – which sections of the material should be studied, and which exercises should be passed. The exercises can be taken an unlimited number of times (preferably, until the answers / solutions are fully correct) and their outcomes will not influence the final grade.

At the end of each week there is a graded test in the Moodle environment and at the end of the course there is a final test. Weekly tests and final test are counted towards assigning the final result - pass or fail. The participants can choose for themselves how they spend their time during the week. This enables them to organize their time the way that is most suitable for them.

During the course period the participants are welcome to ask questions from tutors and discuss the topics with other participants using the forums. There are several forums: News, General Questions, and Technical Problems, as well as separate specific forums for each of the four weeks. Participating in at least one module forum is compulsory for passing the course.

Whenever one sees a question asked in the forum, they are most welcome to answer it, not waiting for explanations from tutors. Helping others to understand the material is the best way to learn!

CERTIFICATES

After completing the course, an electronic certificate of completion is issued to the learner from the SIS. The University of Tartu has issued electronic certificates since 2016. Every certificate is accompanied by a supplement providing the description of topics, volume of work, learning outcomes, lecturers, and the form and result of assessment. If required, additional information about funding, cooperation, or any other relevant information is also included. Our learners have given very appreciative feedback about the certificates, which contain more detailed data about the course which they have passed.

Electronic certificates are verified with the digital stamp of the University of Tartu. The stamp confirms that the document has been issued by the University of Tartu. The certificate is in PDF format, digital verification is in BDOC format.

The documents are created and sent to the learners automatically, so the use of various information systems greatly facilitates the work of the organizers.

PARTICIPANTS

MOOCs are advertised in the University of Tartu's MOOCs list at <https://moocs.ut.ee/> and through various communication channels of INTOSAI and EUROSAI Working Groups on Environmental Auditing such as websites, newsletters, meetings, and e-mail correspondence. Notifying participants of earlier MOOCs about new courses has also proved an effective advertising method.

In total, these three courses have been conducted seven times, with 1,357 attendances by 879 different participants from 98 countries. 105 people have participated in all three courses, 236 in at least two courses and 538 in at least one course. The average completion rate is 60%.

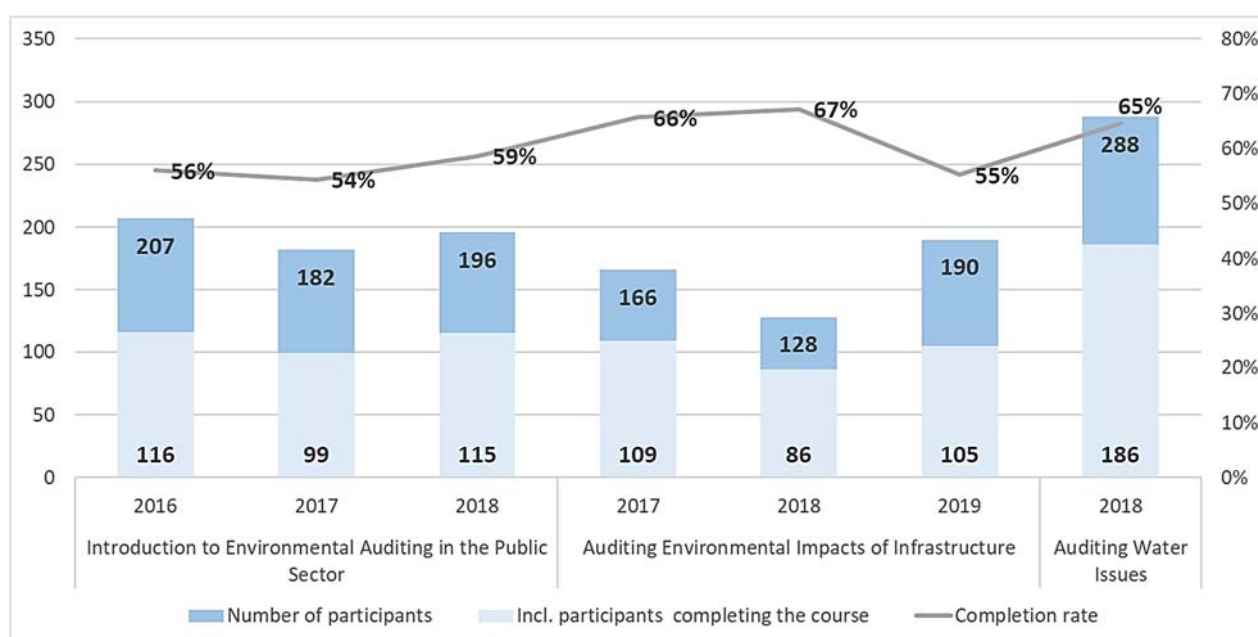


Figure 3: The numbers of participants and the completion rates

Each of the following countries have had at least 10 participants on the MOOCs: Albania, Argentina, Australia, Austria, Botswana, Cameroon, Czech Republic, Estonia, Fiji, Indonesia, Iran, Jamaica, Kuwait, Latvia, Lesotho, Namibia, Nigeria, Thailand, Romania, Samoa, Serbia, South Africa, Spain and Zambia.



Figure 4: Countries of origin of the participants

QUALITY ASSURANCE AND FEEDBACK

These three MOOCs meet the quality criteria for the e-course and applied for the Estonian e-University quality mark (Varendi, Villems, Pilt, Kusmin & Plank, 2018) in 2019. All three MOOCs have received the e-course quality mark and one of them was also nominated for the title “E-course of the year 2019”.

In their feedback, the students said they appreciated the well-planned structure: materials which are well sectioned and easy to work through, and every chapter has a video. The construction and layout are user-friendly and logical. The learners have also pointed out the value of the discussion questions and reflections, and the flexible time-frame that is needed when studying while working full-time.

Learners have highly valued that study materials are freely accessible and easy to print, resourceful and easy to comprehend, with good exercises and topics which have been explained clearly and concisely and included lots of case studies and plenty of audit tips. The content has been relevant and applicable in their work environment.

Learners have also given very positive feedback to teachers who are supportive and of assistance and reply promptly to queries.

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DIGITAL WELLBEING EDUCATION – A COMPENDIUM OF INNOVATIVE PRACTICES

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INTRODUCTION

We live in a highly digitally connected Europe where people of all ages use the internet to link, communicate, explore and learn through digital media. However, a recent JISC study reported that educators in Higher Education institutions are concerned about the wellbeing of their students in digital settings. In addition, the Opening Up education report shows that 70% of educators in the EU understand the importance of digital literacy but only 20-25% students are taught by digitally confident educators (Opening Up Education, 2013¹). Hence, improving the digital literacy of educators is required, particularly in the area of digital wellbeing.

Higher Education institutions are becoming increasingly aware of the consequences of digital distraction and overload on the mental health of individual students, the societal impact on relationships such as cyberbullying, technical issues such as cybersecurity and the addictive design of technology and the controversies surrounding fake news, radicalisation and challenges to democracy.

The Digital Wellbeing Educators Project (DWE), funded by the ERASMUS+ programme of the European Union, aims to increase the capacity of educators in Higher Education institutions so that they can integrate digital education and promote the wellbeing of their students. The first step towards this has been to publish a Compendium of innovative practices and open educational resources that showcases how the challenges of the digital era are addressed by others so that teachers are inspired and can find solutions that can be transferred to their students.

DWE has 6 partners: Lancaster University (UK), Letterkenny Institute of Technology (IE), Universidad de Alcalá (ES), **eucen** (BE), European Institute of E-Learning (DK) and Momentum Marketing Services (IE). The project started in September 2018 and will finish in August 2020.

DEFINITION

When the project started, the partners reflected on which definition of “Digital Wellbeing” to adopt. Many definitions are available, as this is a very broad and interdisciplinary term. However, after some discussion, the consortium agreed to adopt the definition specified in the JISC digital capabilities framework:

Digital Wellbeing is the capacity to look after personal health, safety, relationships and work-life balance in digital settings; to use digital tools in pursuit of personal goals (e.g. health and fitness) and to participate in social and community activities; to act safely and responsibly in digital environments; to negotiate and resolve conflict; to manage digital workload, overload and distraction; to act with concern for the human and

¹ <https://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1389115469384&uri=CELEX:52013DC0654>

natural environment when using digital tools. An understanding of the benefits and risks of digital participation in relation to health and wellbeing outcomes. (JISC 2015²)

METHODOLOGY AND CHALLENGES OF THE RESEARCH

The DWE partnership envisaged a compendium on digital wellbeing that could map the territory, connect people and networks, promote research and awareness, and produce an impact. The first objective was to develop a good practice catalogue in the field of digital wellbeing which included media literacy, digital citizenship and critical thinking. The consortium contacted lecturers, researchers, teachers, policy makers, journalists and other stakeholders with interest in the topic and invited these individuals to submit existing examples and details of their expertise. After reading all the literature collected, a selected number of stakeholders were interviewed to get better understanding of their work and teaching practice. However, when identifying good examples of practices, a number of challenges were detected.

The first challenge was that, although there were some good examples of digital wellbeing available, there were not so many cases focusing on Higher Education. The project partners agreed that since existing practices in other levels of education could be powerful and inspiring examples, the analysis had to take these into account with an open mind, understanding that these experiences could be transferable and adaptable to Higher Education systems as well.

Another challenge found was that the majority of collected practices came from Anglo-Saxon countries, limiting the variety of sampling expected and lacking diversity of perspectives. Consequently, the project partners agreed to broaden the search beyond the initial focus on partner countries (i.e. Spain, Denmark, Ireland and UK). One of the main problems was the lack of formal impact studies carried out. As a result, peer review was used as a means of measuring quality of the studies.

A final 3467 examples from 4 partner countries, Europe and worldwide were collected and 10 interviews with experienced practitioners were carried out. The compendium showcases 14 examples of innovative practices in digital wellbeing education.

CASES INCLUDED IN THE COMPENDIUM

Examples of innovative practices from partner countries (Spain, Denmark, Ireland and UK), Europe and Australia, included in the compendium are:

1. Digital IQ tool (Italy)

The University of Milan Bicocca carried out a sound piece of research that included designing and delivering a course on digital skills including digital wellbeing, then an evaluation of the impact of the research. A new questionnaire, the Digital IQ tool, was developed and validated during the research to assess digital competence and attitudes. The course and questionnaire were used by 3.659 students (aged 15/16) from 171 different classrooms. The study found that the three most important indicators are: media usage habits, digital competence, and subjective wellbeing.

The results of the research show that (i) there is an urgency to act in education, especially in the overuse of smartphones and evaluation of information online, (ii) training courses make significant improvements in the most critical areas, (iii) female students are more affected than male students by digital over-consumption, and (iv) the use of the course had indirect repercussions on subjective wellbeing.

² http://repository.jisc.ac.uk/6611/1/JFL0066F_DIGIGAP_MOD_IND_FRAME.PDF

The impacts of the use of this course include (a) better understanding of uploading personal photos online, (b) reduction of use of smartphones, (c) improved relationships with teachers and students, (d) improved satisfaction in families, and (e) it minimizes inequalities thereby improving the social dimension.

2. *European projects for digital citizenship (EU)*

A number of projects have been funded by the EC on the area of digital citizenship. There are four that can be highlighted:

- the [Digital Citizenship Education](#) (DCE) Project empowers children through education or the acquisition of competences for learning and active participation in digital society;
- [Lie Detectors](#) (EU-wide) tackles digital disinformation and prepares children 10-15 year of age to become critical thinkers. It also empowers teacher to build their confidence in digital news literacy;
- [Acting European 3](#) promotes European citizenship within Romania, facilitating meetings between young people and youth policy makers to promote European citizenship and democratic education.
- The [Equality Training Network](#) promotes gender equality in the context of European integration and citizenship. Courses have been produced for different audience, in Spanish and English, on gender equality in the integration process. Universities in Latin America and Europe are developing relationships and using citizenship education courses to promote inclusion.

3. *Digital Wellbeing projects from the UK*

- [Children's Identities and Citizenship](#)
This project has developed a series of best practice guides for teachers and for teacher trainers, e.g. on European integration in pre- and in-service teacher education. They have also produced guidelines for schools and for teacher training on identity, inclusion of minority groups and European citizenship.
- [JISC](#) is a membership organization, providing digital solutions for UK education and research. It has developed the most widely adopted definition of wellbeing (adopted also by the Digital Wellbeing Educators project) as well as other resources like the Digital Capabilities Framework.
- The [Visual/Video Literacies](#) project created a [MOOC on Visual Literacies: Exploring Educational Practices and Technologies](#) that provides an opportunity for educators to reflect on their understanding of digital literacy, critical thinking and visual media including how identity can be interpreted and constructed online.

4. *A Digital Wellbeing project from Spain*

- The initiative [Women as Spiritus Movens: Towards Equality in European Citizenship](#), focuses on how students cope with the insecurities around education and employment, including issues of presence in a virtual world, prejudice and social exclusion. This project which addresses digital citizenship, gender equality and critical thinking developed a range of open educational materials that can be integrated into courses and discussions.

5. *A Digital Wellbeing project from Denmark*

- The '[Collaboration and Innovation for Better, Personalised and IT-supported Teaching](#)' project aims to develop new approaches to teaching to increase the relevance of education to employers and promote the use of innovative practices in education. The focus is on media literacy, innovative teaching practices and how to foster more personalised and active learning. Ten modules have been developed with teacher guidelines and the materials are free to use and can be adapted by others.

6. *Digital Wellbeing projects from Ireland*

- The [Screenagers International](#) project explores practices around the safe use of digital technologies and social media in youth work. New competences required by youth workers are discussed and recommendations are provided for promoting the use of digital technologies and social media at organisational, national and European level.
- The [Digital Skills Pathway for Youth Across Europe](#) project provides teenagers from across Europe with the opportunity to develop a range of digital media competences such as digital image editing and stop motion animation. The teenagers can show their work, network with others and explore potential careers in the field. There are also materials for the professional development of digital mentors.
- “[All aboard! Digital Skills in Higher Education](#)” aims to improve the digital literacy of university staff, educators and students. The digital skills are presented using the attractive metaphor of a journey and progress is seen as a travelcard that sets out a mini course for students to follow as they travel around the Metro system. Digital badges are awarded on completion of courses. One of the metro lines provides resources on 11 topics within digital wellbeing and identity, e.g. ethics, privacy, reputation and security.

7. *Digital Wellbeing lab (Australia)*

- Dorian Peters and Rafael Calvo from University of Sydney, have carried out several projects focused on the responsible design of technology, advocating a responsible design process that takes into account digital wellbeing and ethics. They have produced a set of open educational resources including training materials, a book, academic papers, tools and methods for responsible design process, an introductory video and a series of videos from key people in the field of computing, psychology, health and wellbeing.

MAIN FINDINGS

The desk research and interviews carried out during the first phase of the project allowed the DWE partners to identify 9 major threats of digital wellbeing:

- i. Distractibility/Finding Balance (cyber loafing)
- ii. Haven for misconduct (cyberbullying, cybersecurity)
- iii. Alienated relationships
- iv. Overconsumption of devices and technologies
- v. Psychological implications (24/7 availability stress, lack of empathy, lack of confidence in using technologies)
- vi. Physical implications
- vii. Unethical attention seeking (addictive design of technology)
- viii. Echo chambers, stereotypes and fake news
- ix. Democracy challenges (promoting social inequalities, radicalization, identity management)

The 4 main drivers for intervention to mitigate these threats are:

- **Theoretical** to highlight the new aspects of wellbeing related to digital technologies also the distinction between the *individual dimension* of digital wellbeing and skills and the *social dimension* of wellbeing related to social norms that build the environment that we live in. The production of theoretical frameworks, for example, could be an answer emerging from this type of motivation.

- **Educational** to build confidence and provide support for educators and students. The development of awareness modules, courses or MOOCs, the presentation of the situation in public lectures or/and workshops could be a response to this type of motivation.
- **Personal** to relate to technology for wellbeing and professional development. Secondary school EU projects have proved to have an important impact (and positive change) in this level.
- **Social** to promote Digital Wellbeing activism, on personal and collective wellbeing, which could mitigate the threats.

There is a need to monitor, reinforce and enhance digital wellbeing issues: habits, performances, skills awareness and a conscious use of digital media should receive more regular and careful attention. Digital wellbeing is a life-long process that needs quantitative and qualitative research.

There is a lack of:

- evidence-based content (i.e. social media users cannot be considered the same as gamers), standardised procedures, evaluation and impact research
- contextualisation and a strategic plan for higher education
- understanding of the uncharted/multidisciplinary field and a change of mindset is required.

The future research directions should:

- develop evidence-based guidelines and evaluation criteria
- create more open access courses for students and educators
- develop European level initiatives and regulation to protect people
- enhance understanding of attention and distraction, and its effects
- develop curriculum for students and educators on digital citizenship
- explore, further, the use of games for digital wellbeing
- translate existing courses into other languages
- identify and track students' preferred media for communications.

NEXT STEPS

The work carried out when collecting materials for the Compendium has given the project consortium a clear view of the topic and a basis for the development of a number of tools. In the next phase of the project the Digital Wellbeing Educators consortium will undertake the following planned products and activities:

A. Digital Wellbeing Education – Open Education Resources and App

The main objective of this output is to teach digital wellbeing to students and young people, so they develop media literacy and critical thinking skills. It will be a resource for educators. The structure of this output will include a curriculum (with detailed learning objectives and expected levels of competencies), a teachers pack (with models examples, case studies and other support materials), an app on digital wellbeing (to provide access to the open education resources and the compendium) and a set of assessment tools (including practical options enabling teachers and trainers to evaluate their students' competences in digital wellbeing issues).

B. Teacher's digital pedagogy toolkit

This toolkit is designed to help learning any of the project's top 20 tools in less than 1 hour. The project has split the tools into a unique [7 category classification system](#) making it really easy to find the best tool for the task needed: from creating a course to preparing an innovative presentation. The Digital Wellbeing Educators' toolkit will showcase 20 of the best digital learning tools and will provide guidance for educators on using these tools in their teaching practice and mainstreaming digital literacy skills.

C. Events:

a) National Showcases in UK, Spain and Ireland

These activities will present, publicly recognise and allow participants to engage with the Compendium of Best Practice, the Digital Wellbeing Educators OERS and App, and the Teachers' Digital Pedagogy Toolkit. Participants will have the chance to explore and make a commitment to use these tools as well as to give feedback to the project consortium. These showcases will be held in Lancaster (UK), Alcala de Henares (ES), and Letterkenny (IE) in April 2020.

b) Digital Wellbeing Professional Development course for educators

The consortium will select 12 Higher Education members of staff (who have a role in teaching or teacher training) to carry out this course. These participants will evaluate the resources of the project. The objective of this event is to train the first group of trainers that use the course, discuss with them the relevance of the training and the potential adoption into their future teaching. This activity will be organised in Letterkenny (IE) in April 2020.

c) Digital Wellbeing International Showcase in Budapest

During this activity eucen will publicly present the project outputs in order to give increased visibility in the Higher Education community. The event, planned for Friday 29 May 2020, will follow the eucen 52nd annual Conference in Budapest (HU). A maximum group of 40 participants will be accepted – those interested need to contact eucen (events@eucen.eu) for further details on the registration process.

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FINANCIAL ADULTERACY – A LIFELONG LEARNING (LLL) SOCIAL ENGAGEMENT OF THE UNIVERSITY TO THE DEVELOPMENT OF BETTER CITIZENSHIP

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ABSTRACT

Life is not free. Regardless of living in times of rapid change, everybody still has to provide for their own needs. The lack of seriousness with which money is treated at times in modern society leads many to assume that they will always have sufficient income for the immediate satisfaction of their needs. As is obvious, this cycle is not infinitely reproducible. Investment and progress only take place if there are savings. Preparing for the future requires a degree of sobriety in income management. Savings are fundamental.

No matter how well informed or well qualified citizens are, it is certain that there has been increasing indebtedness in the average modern household; and, indeed, at national and governmental level as well. The search for higher levels of wellbeing has led to behaviours which are inconsistent with a strictly economic logic. It is necessary to recover the basis of a balanced domestic budget in order to secure the future: not only at the expense of forthcoming incomes but also by deferment of consumption options.

There are no lack of financial management disciplines, regulatory bodies and control mechanisms. There is however a need to teach from an early age what is the meaning of money, and its importance for the acquisition of goods and services. Nonetheless, the numbers and modern behaviour do not seem to correspond to these teachings: the choice of credit mechanisms for personal consumption is markedly increasing, even for those with high incomes. It is this certain limited rationality of human behaviour in relation to money that we will deal here under the subject of “financial *adulteracy*”. Therefore, we propose this concept, which is born from the combination of adulterate (to corrupt or modify), and literacy (to understand or to give good use to), and aims to highlight situations in which people (adults) contravene the golden rules of financial management.

A recognition that, in the course of learning, human feelings overcome these rationalities, adulterating the good principles of budget management and savings that should support a future security, was created in 2012 (DL 227/2012) by the Network of Indebted Consumer Support (RACE) under the supervision of the Directorate-General for Consumer Affairs (DGC). The Office for Consumer Indebtedness (GOEC), linked to ISEG – Lisbon School of Economics & Management - University of Lisbon and the University of Aveiro Extrajudicial Consumer Support Office (GEACE-UA) were created, respectively, in October 2006 and October 2013 and are members of this Network since its inception. It is their function to inform, advice and assist consumers, free of charge and confidentially, in the management of their family budget, and support in the renegotiation of their charges / credits. Aware of the underlying problems, both seek to intervene in society by educating and informing citizens around financial literacy issues, helping to create more informed, responsible and active consumers / citizens.

Considering the good practices promoted internationally, in particular by the Organization for Economic Co-operation and Development (OECD), conveyed by RACE, and by GOEC and GEACE-UA, it is intended to assess the application of these practices by all Portuguese consumers, specifically with regard to their relationship with credit, based on the behaviour revealed by the official statistics from the Central Bank of Portugal.

KEYWORDS: finance, adulteracy, debt, saving.

FRAMEWORK

Life is not free. Looking at Maslow's pyramid of needs, we understand that the satisfaction of most human needs will require the use of economic resources. However, like natural resources, they are neither infinite nor immediately available. They require effort and work. They are the indispensable means that allow access to goods and services, which ensure the survival of people, define their quality of life and promote their well-being.

We live in times of rapid change. Economic, social, scientific and technological knowledge and progress, together with a more globalised world with easier individual travel and distribution of goods, have enabled progress and helped to solve many of the problems associated with subsistence and quality of life.

Nevertheless, one fundamental fact remains: each person still has to provide for their own needs. This is the basis of our reasoning, and why we are not promoting more governmental solutions, at national or supranational level; or emphasizing answers from socioeconomic models; or even analysing the role of international organizations engaged in the search for solutions to such problems. We recognize that such actions are very important and have been vehicles for the development of countries and societies. However, they are often remote from the concrete difficulties experienced by individuals in their real lives. The actions of governments and international organizations, and even the theoretical socioeconomic models, are focused on a larger scale, thinking more about the behaviour of aggregates, populations and economic agents than about the needs of the individual.

Although crisis experiences are not only a characteristic of the modern world, as they have always accompanied the growth of various societies and economies, it is universally recognized that these difficult situations and crises at the macro-economic level trickle down to affect the daily lives of individuals. The recent financial crisis, which is easy to explain but difficult to solve, has forced, in many countries, the intervention of governmental and other regulatory authorities in order to correct situations of fraud and unwise behaviour among financial and credit institutions, curb irresponsibility in product management and financial investments, and even intervene in the management of companies, through the strengthening of corporate governance mechanisms. The result has been greatly increased legislative output; reinforcement of the regulatory and behavioural supervision instruments of financial institutions; control of the actions and decisions of the managers and boards of directors of banks and insurance companies; fraud prevention; and education (information and training) of economic operators, even down to the level of individual households.

Given the cross-pollinating and contaminating effects ensuing from bad decisions on the allocation and use of money, the regulatory and supervisory bodies of the financial system, as well as the political and government agents of the countries, are now more aware of the use of money. Moreover, these types of phenomena are often reflected in the need for external intervention to help to solve the problems of (over)indebtedness – such as the use of such institutions as the International Monetary Fund (IMF) or the European Central Bank

(ECB) – or tax increases, an "almost unique", or at least more "immediate" measure, to respond to private and public deficits and debts.

Awareness of the need for an integrated policy on financial education led to the creation in Portugal, under the responsibility of the National Council of Financial Supervisors (CNSF) [Bank of Portugal, Security Markets Commission (CMVM) and Insurance and Pension Funds Supervisory Authority (ASF)] of the Portuguese National Plan for Financial Education (PNFF) (<https://www.todoscontam.pt/pt-pt>).

The PNFF led by the CNSF has a structure composed of the Coordination Committee responsible for the management of the Plan; the Jury for the "Concurso Todos Contam" (Everybody Counts Contest), a national contest for the best financial education projects to be implemented in schools; and the Monitoring Commission (www.todoscontam.pt/comissao-de-acompanhamento), with 34 partners, whose functions are "to contribute to the identification of training priorities and needs, to provide means for their implementation, to stimulate financial training projects and to propose methods and means for implementing training initiatives."

It is in the context of a society that is much more technologically advanced and in which citizens actively engage every day that we reflect on the easy attitudes to money and in particular to spending today, with many people and households anticipating and perhaps feeling entitled to higher incomes for the immediate satisfaction of all their needs and wants. It is not unreasonable to want better living conditions, access to desirable goods and services, or a good quality of life that should not have to wait for the next generation, or even for 10 or 20 years, or for their retirement. Our citizens, however, feel entitled to all these things now, not in some future time when they have saved enough money. In fact, credit structures and institutions agree with and encourage this approach. However, for living we need money, but to live better or with better quality, for the majority of people and in more modern societies, this means that we need a lot of / much more money.

As is known, the economic cycle is not infinitely reproducible. Investment and progress will only take place if there are savings. Preparing for the future requires a degree of sobriety in personal, business, and public income management. Savings are therefore fundamental.

THE PORTUGUESE CONTEXT

No matter how well informed or well qualified our citizens are, individually or as a society, the reality is that increasing indebtedness of households and governments is a common modern phenomenon. The search for higher levels of well-being has motivated behaviours that are inconsistent with a strictly economic logic. It is necessary to return to the basics of a more prudent and balanced domestic budget approach to secure the future: not only curbing income inflation but also in the postponement of consumption options.

Under the theme of *Active Citizenship and Humanity Engagement*, our concern is focused on the households as economic agents. They most directly feel social and economic changes; and it is on their behalf, ostensibly at least, that governments and companies make decisions, either regulating or creating products and services that are aimed at satisfying their needs and improving their quality of life. Since government actions are implemented on a macroscale, far from the concrete needs of individuals, what is the real situation of these households? Chart 1, obtained from Pordata, a database on contemporary Portugal with official statistics, shows the evolution of income, expenditure and savings of Portuguese households over the last two decades:

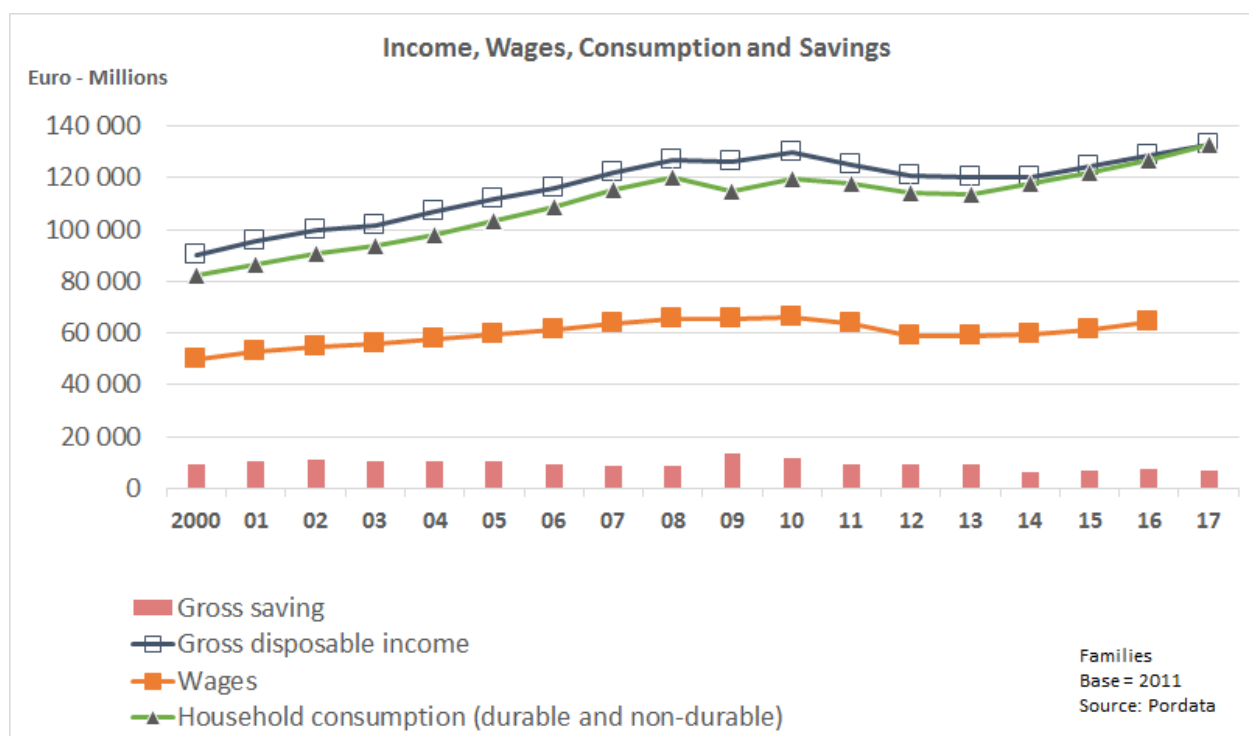


Chart 1 – Income, Wages, Consumption and Savings of Portuguese Households

As can be observed, wages, as a "single" remuneration of the productive factor, are not sufficient nor the only source of income for the levels of consumption of households in Portugal. Chart 2 further shows that consumer spending is even higher than income levels in 2017:

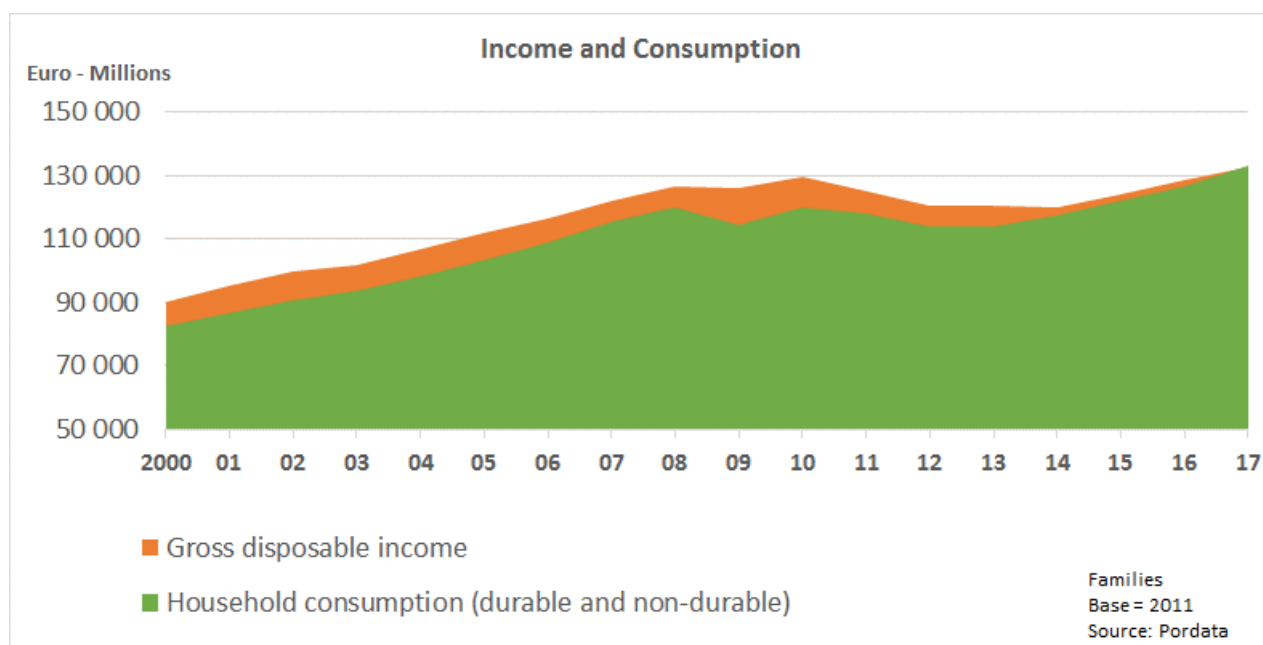


Chart 2 – Income and Consumption of Portuguese Households

Chart 3 shows the evolution, in the same period, of savings rates. The dashed line represents the trend line of the behavior of the savings rates of Portuguese Households from 2000 to 2018.

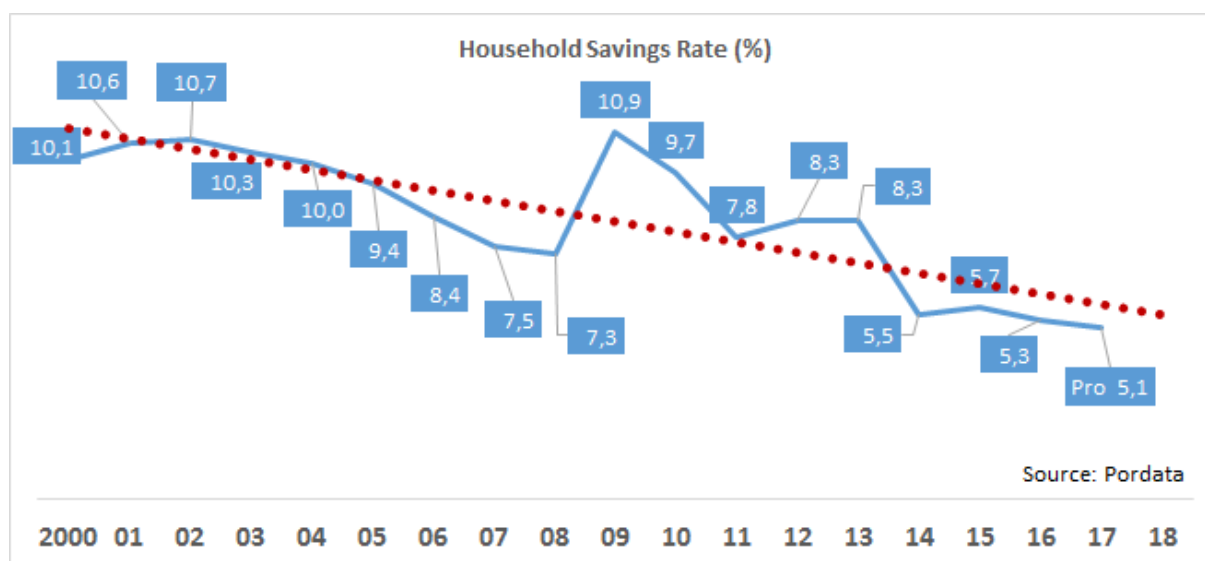


Chart 3 – Savings Rate of Portuguese Households

As can be seen, not only is there a downward trend in the savings efforts of Portuguese households, but currently it accounts for only half the value of the rate recorded in the year 2000. Despite the crisis (2008-2013) generating fear for the future, which temporarily increased the level of savings, the reality is that after the initial shock and nervousness has receded the option for higher levels of consumption has prevailed.

In summary, and as shown in Table 1, yield is multiplied in 2017 by 1.47 compared to 2000, but consumption is multiplied by 1.61.

Year	Income	Consumption	Δ
2000	90 267,90	82 504,90	7 763,00
2017	132 602,80	132 947,40	-344,60

(Base = 2011)
Source: Pordata

Table 1 – Income and Consumption of Portuguese Households (2000; 2017)

In conclusion, it can be said that a problem that, on average, associates less savings with more credit, and consequently more debt, has been aggravated during this period, and the trend is continuing. Although this is a common framework for many countries and societies, this has prevented a more healthy and harmonious economic growth for Portugal and its citizens.

FINANCIAL ADULTERACY

It is in thinking about this limited rationality of human conduct in relation to money that the issue of financial "*adulteracy*" will be dealt with here. There is no lack of financial management disciplines, regulators, and control mechanisms. There has been an effort to teach, from the early years, what money means and why it is needed. However, as has been seen, the numbers and behaviours do not seem to correspond to these lessons: the option for using credit mechanisms for personal consumption is markedly increasing, even for those who have high incomes.

The term financial *adulteracy* arises, therefore, from the combination between adulterating (corrupting or modifying) and literacy, and intends to highlight situations in which people (adults) contradict the golden rules of financial management. The use of easy credit, even at higher interest rates and with less compatibility with average individual or household income, exceeds the prudence required when it is necessary to moderate consumption levels.

However, it must be recognized that not all credit is bad. The use of virtuous and conscious credit, associated with certain types of acquisitions such as the purchase of housing, is a driving force of the economy and people's quality of life. The conscious, informed and responsible use of loans, if anchored in rational management of income and savings, is the basis for the development and application of financial literacy.

However, this is not the picture that has characterized the economy of most European countries since 2008/09. The deterioration of economic and financial conditions has exposed numerous situations of household over-indebtedness, associated with a high growth of default in credit agreements, and the decapitalization or even bankruptcy of many institutions of the financial system. Are we facing an individual or institutional problem or both?

The answer to this question is not simple. In the context of market economies in which people made their income application and investment decisions, the processes of choice and prioritization of needs satisfaction are not always accompanied by the economic reality that is (and should be) taught. The easiness with which credit is accessed, the countless credit offers and incentives that the financial institutions advertise, together with the fact that people want to improve their living and comfort levels much faster, tend to make the whole system over-heated. In fact, the system has anchored its growth in fast results and in anticipated profits, but with behaviours that do not respect the real growth of the overall economies, the creation of national wealth or the fundamental rule that consumption should never be higher than income.

It is known that, in principle, open competition systems allow competitive situations that respond better to the satisfaction of human needs, with a more diversified supply, at lower prices and faster. But systems are not perfect and not all decision-making follows the rules of economic and financial prudence. Free choice does not free us from our responsibilities, which is why this is a phenomenon that worries everyone. The problems of information asymmetries between consumers and credit institutions are combined with the disproportion of (in)formation and means in disadvantage of the consumers. There are, in fact, only a few entities of the financial system that follow a "prudent, correct and transparent action at all stages of credit relations with their customers as consumers".

SOME ANSWERS

A recognition that, in the course of learning, human feelings overcome these rationalities, adulterating the good principles of budgetary management and savings which should support a future security, together with the weaknesses of the financial system, was created in 2012

(Decree-Law No. 227/2012) by the Underfunded Consumer Support Network (RACE) under the supervision of the Directorate-General for Consumer Affairs (DGC).

The Office for Consumer Indebtedness (GOEC), linked to ISEG - Lisbon School of Economics & Management - University of Lisbon and the University of Aveiro Extrajudicial Consumer Support Office (GEACE-UA) were created, respectively, in October 2006 and October 2013 and have been part of this Network since its inception. It is their function to inform, advise and assist consumers, free of charge and confidentially, in the management of their family budget, and support in the renegotiation of their charges / credits.

Aware of the underlying problems, both seek to intervene in society by providing training and information on financial literacy issues, seeking to encourage more informed, responsible and active consumers / citizens. As stated in Decree-Law no. 227/2012, the RACE offices should "inform, advise and monitor consumers who are at risk of default with credit agreements negotiated with a credit institution or that are late with those obligations."

Considering the internationally promoted good practices, notably by the OECD, carried out by RACE, and in particular by GOEC and GEACE-UA, we intend to assess the application of these practices by Portuguese consumers, in particular with regard to their relationship with credit, based on the behaviour revealed by the official statistics, namely *Banco de Portugal*.

In addition to helping and informing consumers about credit and family budget management, and ensuring technical, professional and documented support, these offices also develop important financial education in the communities and territories under their influence.

GOEC and GEACE-UA, as provided for in Decree-Law no. 227/2012, are part of the network to support bank clients in the prevention of non-compliance and in out-of-court settlement of situations of non-compliance with credit agreements.

The out-of-court banking support network is made up of legal persons, either public or private, who, under certain conditions, are recognized by the Directorate-General for Consumer Affairs after obtaining the prior opinion of the Bank of Portugal. They do not act with credit institutions, but adopt conciliation, mediation or arbitration mechanisms with a view to obtain agreements between bank clients and credit institutions. Their activity ceases as soon as they become aware of the existence of legal proceedings related to the credit agreement(s) for which the support was requested. They must respect the principles of independence, impartiality, legality and transparency, and are subject to professional secrecy.

The many cases that we have been following up on in the operation of these two offices are a real sign of the scale of the problems we have been describing and of the need to intervene with consumers and households on these matters. The reasons why people justify their situations of over-indebtedness, default or inability to manage the family budget are very diverse. There is, however, one common fact: they all affect family security, personal and professional stability, and individual and collective well-being.

It is, therefore, with all these contexts that one of the basic propositions of our work is confirmed: the elaboration of a household budget, regardless of its complexity, is fundamental for the adequate management of a household's resources. In addition, there is a real need for people to have free and confidential information, while preserving their privacy, but seeking help and advice, without this being an additional burden on the financial problems they seek to solve.

These offices, linked to two universities, are deeply committed to actions to increase people's awareness of economic changes taking place in society and to reconcile households' needs and desires with the households' budget.

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LABOUR WORLD AND PROFESSIONAL SYSTEMS' TRANSFORMATIONS: NEW CHALLENGES FOR UNIVERSITIES

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THE REFERENCE SCENARIO

The reference scenario of this contribution is related to the transition from the knowledge society to the learning society. This change had a significant impact in redesigning the work and some relevant features of knowledge workers. The growth of the knowledge and learning dimension, required for an increasing number of jobs, leads us to reflect on a further step: the change from knowledge workers to learning workers.

Some international steering documents (European Commission, 1995; UNESCO, 2005; UN, 2015) have acknowledged the advent of a new type of society, where the previous constraints on where and when organised knowledge could be acquired are no longer applicable. In this new society, on the one hand lifelong learning (conceived as a citizen's duty as well as a right) becomes the keystone of the construction of training pathways for professional and personal growth. On the other hand, institutions are asked for a timely and effective response to the challenges of social and economic change and to the endless recurrent transitions in people's lives.

In 2010, the Harvard Business Review emphasized the necessity to consider every company employee and collaborator as a knowledge worker, anticipating the idea of widespread and shared knowledge representing one of the characteristics of current jobs (Hagel, Brown and Davidson, 2010).

In 2016, Jacob Morgan published an article on Forbes with an eloquent title: "Say Goodbye to Knowledge Workers and Welcome to Learning Workers". The spread of knowledge and its rapid change are the main causes of the transition from knowledge workers to learning workers.

In the knowledge society, knowledge workers assume an increasingly important role: fully immersed in the work process, they use more and more knowledge in their jobs (Drucker, 1959, 1969, 1987). In fact, the working processes require a new combination of skills and competences and are characterised by demographic heterogeneity, fluidity and variety, flexibility, responsible autonomy, collaboration, temporal intensity and vision, and not just performance (Bagnara, 2010).

Greater responsibility attached to a role also means more complexity in the performance of that role, but, in many cases, there is not as much recognition in terms of status and dignified working conditions, or active support for worker welfare, making it increasingly difficult to get a good job which is stable and rewarding. The time taken to obtain a satisfying job tends to lengthen; and it is equally difficult to maintain it, often working more and earning less. Additionally, if the job is lost, it is difficult to get new opportunities (Negrelli, 2013).

The progress of the division of labour generates more knowledge-based work and new jobs, and new social groups in search of recognition rather than instability, precariousness and new forms of inequality (Butera & Di Guardo, 2010; Gallino, 2014; Negrelli, 2013).

In the knowledge economy, a worker is required to be increasingly educated and trained, creative, resourceful, flexible, autonomous and responsible; a significant dimension of the "know-how" of work tends to expand. Nevertheless, at the same time, work becomes more precarious and the complexity of services increases; but in many cases, there is no equivalent recognition in terms of status and working conditions, making it increasingly difficult to get a good, stable and rewarding job (Negrelli, 2013).

The capitalist economy is transformed by the knowledge economy, thanks to Internet and knowledge workers. One of these transformations is an emerging new way of producing knowledge: collaborative, transparent and open, which contrasts with the traditional way of producing goods and services. The internet, free and open source software, social networks, Wikipedia and open science are the first important and concrete demonstrations of the success of new production methods. These changes have the capacity to generate a global cultural revolution which heralds a radical transformation of knowledge production, distribution and consumption. Knowledge workers are producers of a collective intelligence, based on individual initiative and teamwork, on trust and equal exchange, on democracy and meritocracy, which rapidly generates and multiplies new knowledge and has the potential capability of governing more advanced forms of production. In the knowledge economy, trust, reciprocity and voluntary cooperation are fundamental conditions for producing solutions to problems, developing smarter, more efficient and more effective production models (Gazzini, 2008).

On a more general level, some knowledge workers experience phenomena of psychological and social criticality linked to the inability to manage stress. In globalization, offshoring processes and the crisis threaten white-collar jobs as well as the blue-collar workers. Many knowledge workers are over 45 and are vulnerable in the labour market. Forms of protection and representation are scarce in self-employment and in "flexible" forms of work. The numerical expansion and the centrality of the role of knowledge workers pose the problem of their adequate political representation and their full participation in the economic and political system (Grazzini, 2008).

The growth of the role of knowledge and the rapidity of change in the workplace create the need for a constant updating of the knowledge held by workers, which generates the further transition from knowledge society to learning society and thus from knowledge workers to learning workers

Jarvis (2012) proposes three different interpretations of a learning society, based on existing literature.

The first refers to a futuristic or rather idealistic concept of the learning society as an educational society: as an ideal to strive for, which can be achieved only through a reform of public educational institutions.

The second refers to the learning market, in which the production of knowledge becomes an industry in the contemporary consumer society; it cultivates people's desire to learn, so that they can take part in contemporary society. Today, it is possible to learn in a fun way – as consuming is a fun action: thanks to countless tools, exposure to different environments, and without limits of time. Providers of these learning sources are not educational institutions, thus pressuring the latter to change their approach quickly.

Finally, the third refers to the reflexive society; reflexive learning is a symbol of the learning society. Society has become reflexive (Giddens, 1990; Schön, 1983), and in this perspective the knowledge that people acquire is no longer certain and stable forever; its value lies in allowing them to live in this rapidly changing society. A great part of this learning is individual and private, but a part is still public, which challenges public educational institutions, for

example in the case of knowledge-based occupations. In addition, the need to acquire new knowledge is pervasive, but learning new things and acting on their basis always contains an element of risk (Beck, 1986). As Jarvis argued in 2007 the crucial role of lifelong learning only gained mainstream status when ongoing learning became more work oriented. Now lifelong learning is recognized as a condition for economic competitiveness in a global economy, replacing the earlier conception of lifelong learning as a condition for democratic citizenship (Raggatt, Edwards & Small, 1996).

This change, together with the marketization of education, produces a further challenge to public educational institutions: to ensure the former function (making people and the economy competitive) without abandoning the latter (being an instrument of peoples' empowerment and of strengthening democracy).

Today, learning has become an intrinsic characteristic of a growing number of jobs and crafts; in most cases, the ability to learn autonomously is increasingly related to the ability to act independently.

The main resource of the person is no longer and only their existing knowledge, but the ability to acquire new knowledge, applying it to new environments and scenarios. The worker's ability to learn and adapt is more important than the knowledge possessed at recruitment. The strategic competence of learning to learn, as well as the ability to adapt, to understand and manage change, to find new solutions to new problems, is crucial. Hence also the need to combine with specific technical skills and the ability to self-analyse one's training needs, and to self-build one's learning paths, based on the critical examination of professional situations in which people work.

IMPLICATIONS FOR ORGANISATIONS AND WORKERS

Organizations are increasingly characterised as learning organizations, subject to forces that transform their characteristics, especially related to structures and processes, but which also drive their culture towards new logics which are less hierarchical and more open, flat, networked and adhocratic (Cocozza, 2012).

New challenges for workers are different, in quantity and quality, and have continually evolving implications: effectively applying their learning ability to new situations and problems, and developing the ability to learn quickly. Increasingly the focus is on research and discovery, with challenges such as information overload, compliance and giving meaning to data (Al-Kofahi, 2018).

For organizations, there is a growing need to constantly support the worker's learning process. They must begin to interpret the concept of workplace learning and on-the-job learning in a new way: the contribution provided by the person's involvement in activities and working relationships becomes the crucial element. Thus, learning acquired in different ways from traditional programs developed in institutional training contexts are valued (Billett, 2001, 2008, 2014).

For workers, the opportunities offered by this changing environment appear to be considerable: flexibility, conciliation, teamwork, networking, initiative, creativity, autonomy, responsibility. But these traits paradoxically can become critical elements to self-manage: the difficulty of managing time and space of work and of bearing the weight of planning one's own work; the frequent need to respond to various requests simultaneously; the overall and increasing precariousness of the employment situation and conditions for many workers in this environment.

Being 'self-navigators' is increasingly necessary, in part because the links between education and employment are so complex. Research shows that educational qualifications, although important, do not correspond directly to employment outcomes. [...] Being good navigators requires a conscious approach to personal development so that individuals can see how their personal biography has developed in the past and how it is currently being constructed so that they can make decisions about their future options. Being good navigators also requires a deep understanding of the nature of the social, economic, and political world in which they are living and their relationships with others, locally and globally. (Wyn, 2014, p.12)

Casey (2003) underlines the prevailing economic perspective, according to which economic and managerial models overcome human subjectivity, and learning interests are not strictly linked to market needs. This leads the author to propose a broader perspective, which can connect the productive needs of companies with individual empowerment and societal democratic citizenship.

Another critical element is the continuous shift in the responsibility for work from the organizations - and from the systems - to the worker. A kind of collapse on the individual level of business, economic and social problems that seems to be solved by the individual worker, as Beck had already suggested in 1986.

In a broader and mid-term perspective, we think that the needs of the economic and social systems and those of individuals can overlap significantly, and that one of the tasks of public educational institutions is to pursue this perspective and show that the contradiction between collective and individual needs is only apparent and short-term. That is to say that, in the long run, workers who are ready to manage change and able to learn constantly and reflexively, being also aware and active citizens, will allow for "squaring the circle" between freedom, social security and political democracy, as Dahrendorf had well anticipated in 1999.

CHALLENGES FOR UNIVERSITIES

The three missions of universities, in different ways, are all questioned by increasing complexity, labour market crises, lifelong and life-wide learning implications (Frignani, 2014). Universities are called to prepare students - and to accompany adult learners who return to study - for the challenges of today's working world, preparing them to become "self-navigators", through innovative guidance services and multidisciplinary and open pioneering learning processes.

First of all, universities must complete their transformation from "exclusive owners" of knowledge to organisers, enhancers and promoters of widespread knowledge in society and the economy; not forgetting, of course, the creation of new knowledge through research, which remains a distinctive element of universities. It is strange that this aspect has been analysed especially in terms of new teaching methodologies, which put the learner at the centre, without realising that the centrality of the learner also changes the function of the university.

Moreover, universities have an important political role to play, facing the contradictory messages sent to learners from contemporary society. On one side, there is the pressure on individuals, presented as the only ones responsible for their future and called to solve through their life trajectories the problems that society is not able to face. As argued above, universities cannot ignore this pressure on individuals, and must answer with stronger services in the areas of guidance, lifelong learning, recognition of competences, etc. (Palumbo and Startari, 2013; Palumbo and Proietti, 2018; Proietti, 2019). On the other side, Universities must fulfil the task of soliciting critical thinking and awareness of learners as

citizens and strengthen their ability to be active citizens. This can happen in two ways. Firstly, by cultivating the critical thinking that has always characterized the university and has often justified the suspicion with which the holders of power have considered universities: indispensable for the progress of science, but dangerous to social consensus, to privilege preservation and to the reproduction of inequalities. Secondly, by promoting forms of social innovation and participatory social design that allow scientific knowledge to enrich social life forms, from welfare services to the circular economy to environmental sustainability.

These transformations pave the way to a rethinking of universities' role in society. Therefore, we must consider the challenges for social innovation, with an evolution from Triple to Quadruple Helix approach proposed by Etzkowitz and Leydesdorff (2000) and by Carayannis and Campbell (2009), who defined the fourth helix as "the media based and culture based public", associated with the "creative class". In this vein, the focus on relationships among governments, industries and universities widen to include a fourth pillar, civil society, and the role of universities grows toward a more global and "universal" task: to consider not only the evolutionary needs of economy and society, but also critical forecasting of the future of work in a *finanzcapitalismo* (Gallino, 2011) globalized society.

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ENTER.MODE – AN INTERNSHIP MODEL FOR DEVELOPING ENTREPRENEURIAL SKILLS IN THE STUDENTS

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ABSTRACT

Competitiveness of the European economy requires citizens and particularly young people to be innovative, creative and flexible in order to face the challenges posed by a dynamic and constantly changing economy. Young people need to become ‘entrepreneurs’: they should be able to turn ideas into action, successfully develop new commercial and social ventures and be innovators in the organisations where they work. Entrepreneurship skills include creativity, innovation and risk taking, as well as the ability to plan and manage projects in order to achieve objectives.

The entrepreneurial mind-set and skills, however, are not personal characteristics: they can be developed through learning and experience and achieved within the education system. The European Union has set a strategic objective to enhance creativity and innovation, including entrepreneurship, at all levels of education and training (Education and Training 2020).

EnterMode aims to foster partnerships between higher education institutions (HEIs) and companies in order to promote entrepreneurial education and develop an internship model for the acquisition of entrepreneurship skills that includes different levels of learning, using an online ‘serious game’.

BACKGROUND

Entrepreneurs play an important role in the economic and social well-being of Europe and European citizens (European Commission, 2016). Entrepreneurial mind-set and skills are among the key competences for lifelong learning, and are key assets in developing a European knowledge economy, fostering innovation and competitiveness in European society and addressing the current challenges produced by globalisation (European Union, 2018).

Research has shown that an entrepreneurial mind-set and skills can be developed through learning and experience, rather than being a given, personal characteristic (European Union, 2015). The European Union has in fact set as one of its strategic objectives the enhancement of creativity and innovation at all levels of education and training, and has proposed the EntreComp: the Entrepreneurship Competence Framework (European Commission, 2016).

However, the level of progress towards entrepreneurship education in Europe is still very low and highly variable. Only a minority of European countries have well developed strategies. Some EU countries, such as Germany and Ireland, have progressed very well in the past few years, while others, such as member states from Eastern and South Eastern Europe, still lag behind EU targets for entrepreneurship (Eurostat, 2017).

In many European countries, entrepreneurship education offered within non-business studies courses is not sufficiently integrated into the curriculum. Entrepreneurship courses are often offered as separate or optional courses and tend to focus more on technical knowledge and skills around how to set up a business, rather than building an entrepreneurial mind-set and soft skills (OECD, 2008; Florea, 2013).

THE ENTERMODE PROJECT

The EnterMode consortium, consisting of 14 organisations from 8 countries¹, undertook to take European entrepreneurship education a step further by developing and testing an innovative model of entrepreneurship education, which embeds different levels of learning.

The project aims at stimulating entrepreneurship and enhancing entrepreneurial skills among higher education teachers and company staff on the one hand, and higher education students on the other. The project seeks to develop an integrated approach and model for entrepreneurship education that can be adapted and applied throughout Europe.

The EnterMode integrated approach is based on six pillars, which together cover different levels of learning:

1. In-company internships that involve HE students and embed the use of serious games based on constructivist pedagogy and rich learning tools, allowing for an authentic experience of entrepreneurial roles and tasks as well as for developing problem-solving strategies towards real entrepreneurial challenges
2. Capacity-building addressed to teachers and trainers to facilitate the incubation of an entrepreneurship spirit and culture and the development of the knowledge, competences and skills needed to put entrepreneurship into practice, supporting the application of the internship model
3. Building up of a community of practice that supports the development, sharing and critical reflection of entrepreneurship practice as well as the socialisation of newcomers into the world of business
4. Strong Open Educational Resources (OER) knowledge base, providing both teachers and the community with case studies of real world entrepreneurship
5. Use of learning analytics, allowing learning progress to be tracked on both personal and collective levels and creating feedback loops by which the EnterMode model can be adapted to personal and organisational needs
6. Creation of HEI-company partnerships, with a view to experiment and validate the internship model, and ensure its sustainability

BACKGROUND STUDY ON “ENTREPRENEURIAL EDUCATION AND INTERNSHIPS IN HIGHER EDUCATION IN PARTNER COUNTRIES”.

EnterMode’s first output was a **Background Study on entrepreneurial education and internships in Higher Education (HE)** in the countries of the participating partners (EnterMode Consortium, 2019a). The background study was elaborated through a combination of desk research, interviews and surveys, carried out in Germany, Greece, Hungary, Italy and Slovakia, and resulting in the development of five national reports. An executive summary contains key recommendations which influence the development of the internship model for the acquisition of entrepreneurial skills and competences by higher education students.

¹ Of these organisations, 5 are universities, 5 are companies, 2 are research organisations, one is an association of companies and one is a European network of higher education institutions.

The study analysed the context in the partners' countries with regards to the following issues:

- Entrepreneurial education in HE for students of non-business studies courses
- HE framework for internships
- Views of stakeholders (students, HEI staff and companies) on required characteristics of internship programmes
- Views of internship stakeholders (HEI staff and companies) on needed entrepreneurial competences
- Views of internship stakeholders (students, HEI staff and companies) on gamification as a learning tool for entrepreneurial education

The study was co-ordinated by the University of Ioannina (UoI) with the collaboration and participation of the Ludwig-Maximilians Universität (LMU), the Sommelweis University (SOTE), the Università Telematica PEGASO and the Technická Univerzita v Košiciach (TUKE).

Conclusions and suggestions based on the findings of this background study have fed into the development of the internship model, which is the key output of the project. The background study can be consulted and downloaded for free on the EnterMode project website: <http://entermode.eu/>

ENTERMODE INTERNSHIP MODEL FOR THE ACQUISITION OF ENTREPRENEURIAL MIND-SET AND COMPETENCES

Within higher education, internships are work-placements, aiming mainly to acquire professional experience in the specific field of study and soft employment skills. In this type of internship there is often a lack of coordination between the sending HEI and the hosting company on the specific objectives, activities and expected results of the internship (Narayanan *et al.*, 2010).

As well as giving students a real-life experience of the workplace, the internship model proposed by EnterMode (EnterMode Consortium, 2019b) is meant to be used for the acquisition of entrepreneurial skills and competences by students in higher education, using a challenge-based approach with gamification elements. This model aims to support students in higher education to:

- develop personal attributes and skills that form the basis of an entrepreneurial mind-set and behaviour, such as creativity, sense of initiative, risk-taking, autonomy, self-confidence, leadership, and team spirit
- raise awareness about self-employment and entrepreneurship as possible career options
- work on concrete enterprise projects and activities
- acquire specific business skills and knowledge of how to start a company and run it successfully

To acquire these entrepreneurial skills, the EnterMode model proposes the implementation of challenge-based learning and gamification elements which will facilitate the acquisition of entrepreneurial skills and competences as well as their advancement to the next progression level. The internship model uses the Entrepreneurship Competence Framework, also known as EntreComp framework (European Commission, 2016) as reference, by promoting specific challenges that target entrepreneurial competences identified by the framework.

These challenges are going to be identified by the internship trainers and will also be supported by the use of learning analytics, incubation services and a serious game.

Challenge based learning

The EnterMode model is based on the use of the challenge-based learning method (Nichols *et al*, 2016) which, as the name suggests, uses challenges to frame learning experiences. This method proposes a collaborative framework, where students gain in-depth knowledge and develop employability skills and entrepreneurial competences while trying to discover and solve challenges. When faced with a challenge, groups or individuals leverage experience, harness internal and external resources, develop a plan and push forward to find the best solution. This student-centred approach allows interns to enact problems usually faced in the workplace and real world, whilst enhancing transferable skills such as teamwork, problem solving, risk assumption, public speaking, confidence, self-motivation, and creativity. According to Nichols *et al* (2016), the challenge-based learning framework divides into three interconnected phases: Engage, Investigate and Act. Each phase includes activities that prepare the learners to move to the next stage.

Based on the above framework, the EnterMode internship model is divided into three phases.

Phase 1: Engagement

In this phase, tutors and mentors set the challenge to be addressed by the interns. The concept should be open-ended and represent a real need, a real problem, a project or anything within the interests of the company. Following the establishment of the main challenge, the learners will need to contextualise and personalise the concept, by developing the final concrete challenge which needs a solution. Based on the final description of the challenge, the trainers will define the entrepreneurial competence that will be cultivated, based in the EntreComp framework.

Phase 2: Investigation

In this second phase, the trainers will need to define the concrete actions which will lead to the development of the entrepreneurial competences and the completion of the challenge, while students will develop the solution to the challenge. During this phase, the available resources will also have to be defined. Resources could be of several types: provided by the company, mobilised by the student or gained from the serious game developed by the EnterMode project (see later in this paper).

Phase 3: Action

During this phase students select, develop and implement solutions which lead to the completion of the challenge. The amount of time and resources available guide the depth and influence the implementation of the solutions. During this phase learning is independent and self-regulated, although trainers should offer guidance and support to the interns.

An essential part of this phase is also the monitoring and evaluation of the progress of the students, according to goals set at the previous stages. Assessment is part of the monitoring process and can be implemented through different sources: assessment by the trainers, assessment by peers, self-assessment.

EnterMode serious game

In the EnterMode model, the challenge-based learning methodology is enhanced with gamification elements, which are designed to support the acquisition of entrepreneurial skills and competencies.

Gamification (Huotari & Hamari, 2012) is a learning approach which helps advance knowledge and engage students in the learning process (de Sousa Borges *et al.*, 2014). As a learning practice, gamification can be used to enhance the motivation and active engagement of students. Specifically, it consists of the use of game elements, including constraints (limited resources, time); rewards (achievement badges, extra resources); ownership (autonomy, choices); and luck (new opportunities and obstacles). All these elements serve as tools to implement specific activities in the framework of the internship, engaging students and helping them reach their final goal, i.e. the acquisition of entrepreneurial competences and skills.

The EnterMode consortium partners will develop a serious game, which materialises the training methodology and supports the entrepreneurial skills during internships. The serious game will be offered online, be accessible to students undertaking their internships and provide gamification elements to the whole process.

The online game will be designed in a way that can be parameterized for different contexts and situations, thus it can be applied during different internship programmes. It will also incorporate learning analytics mechanisms, which aim at a better understanding and improvement of the learning environment, such as through social network analysis, interaction patterns, information flows or user modelling. Learning analytics will allow the selection of data both at individual level and at institutional level, thus allowing both HEIs and companies to effectively match learning offers with the real needs of students.

The serious game combines entertainment with knowledge transfer and its purpose is to train the interns to improve their competences and understand the concept of entrepreneurship. The virtual environment allows the students to increase their experience and discover skills and knowledge. The research each student undertakes to complete a quest leads him or her to overcome certain difficulties which could not be resolved in the real world. Meanwhile, mistakes made by students are not seen as failures but opportunities to receive feedback and learn, while players have the ability to track the consequences of their decisions.

Incubation

The companies which will implement the entrepreneurial internship will act as “incubators” to students and will help them develop their own ideas, based on a given challenge.

Higher education tutors and companies’ mentors will create a friendly incubation environment for students in the company, which will respond to learners’ interests and needs. Companies will offer resources to the students, such as office space, equipment, administrative support, etc. They will also offer training and educational support, while contributing to the networking of students. They will help students complete activities connected to entrepreneurship like formulating a business plan, developing an initial idea, mobilising resources, mobilising others, and many more activities to develop their skills and learning. Most importantly, they will provide vital information to the students such as financial risks connected with businesses, market potentials, risks, legal complications, insurance options, etc. The main role of the companies is to increase the experience and the competences of the young entrepreneurs.

Another aspect that will nurture the entrepreneurial spirit of students will be the opportunity to build and expand their network. During their internship, students will be employed in a company in their interest area, chosen by themselves, where they will get to know people with vast experience in the field. Those people will provide information and guidance to the students, and help them to explore the ups and downs of the sector they chose, as well as the opportunities and threats they will encounter in the future. Networking is an essential part of entrepreneurship which will help students expand their circles of acquaintances, find out about job opportunities, and increase their awareness of news and trends in their chosen employment area. In this context, students will have the opportunity to develop relationships with people and companies they may do business with in the future.

EnterMode Community of practice

The development of the EnterMode model entails the setting up of a Community of Practice (Wenger, 1998) of higher education teachers and company trainers that will offer a wide range of learning tools and collaboration tools to its members. The Community is hosted on the DISCUSS Communities of Practice platform² and capitalizes on previous and ongoing initiatives. It will include elements such as personal space, forums, YouTube videos and open educational resources that will provide both the community and teachers with articles, handouts, supporting materials, etc., which can be used for challenge-based learning and reflection.

The objective of the Community of Practice (CoP) is to provide a space for learning and collaboration between higher education teachers and company-based trainers who are tasked with developing entrepreneurial skills in students, adopting the EnterMode model and organising students' internships. The CoP will be a central element of the project that will connect the staff involved in the project with other interested parties in a Community and will integrate the different elements of the project, i.e. the model, the online game, the partnerships and the capacity building for the teachers and trainers.

Last but not least, the CoP will use learning analytics in order to track and direct learning progress. Collected data on activities, such as contributions to the community of practice or achievements in the EnterMode serious game can be used for the evaluation and control of knowledge-based processes.

Impact and sustainability of the model

The pilot experimentation of the model will involve a total of 40 students from the five universities partners in the project who will go for both national internships and transnational work-placements. The results of the experimentation will be used for the finalisation of all project outputs. After the finalisation of the model, the partners plan to incorporate it into their regular services and activities.

The adoption of the EnterMode internship model as a new scheme for the organisation of internships does not require additional financial and human resources. The internship model can be integrated in the services that the career offices, internship offices and international relations offices are already offering to students at no additional cost.

The EnterMode internship model aims to be comprehensive and to offer a tool that can be adapted to different needs. It is not prescriptive, and it does not suggest that all learners should acquire the highest level of proficiency in the competences, or that they should reach the same proficiency across all the competences.

² <https://www.discuss-community.eu/>

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SUSTAINABLE GASTRONOMY EDUCATION TO ACHIEVE SDGs: SUPPORTING SOFT SKILLS DEVELOPMENT AND MONITORING CHANGES IN STUDENTS' AWARENESS

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INTRODUCTION

The average temperature in Finland has been rising by 2-6 degrees in this century (Ruosteenoja *et al.*, 2016). In the context of climate change, food production is one of the major sources of greenhouse gas emissions globally. Climate warming also affects weather and water conditions negatively, but at the same time it also opens new possibilities for sustainable food business. Finland, as a responsible actor and pioneer in technology, could have a significant role globally in minimizing the effects of climate change. Finland can act as an example of a country being able to act in an economically, socially and ecologically sustainable way in food production and businesses.

The 17 Sustainable Development Goals (SDGs) came into force in January 2016 as part of the 2030 Agenda. Their aim is to trigger transformative actions across society (United Nations, 2015). All SDGs are connected to sustainable and healthy food, either directly or indirectly (Stockholm Resilience Centre, 2016): the variety of environmental impacts generated by the food system, as well as its social and economic implications, make food the most significant contributor to the transition towards a more sustainable society. Consequently, it is crucial to provide the leaders of tomorrow with the competences necessary to interact with various stakeholders of the food system and to act beyond individual disciplines towards an increased overall sustainability. Wesselink *et al.* (2015) identified such 'soft skills' and competences as systems thinking, embracing diversity and interdisciplinarity, interpersonal competence, action competence and strategic management.

Previous research (Allievi *et al.*, 2018) has highlighted how experiential approaches to teaching and learning can play a pivotal role in providing students with such soft skills, required also for a better handling of the complexities of food systems. Fitting within this scope, education for an increased level of global citizenship also becomes relevant within the context of the Sustainable Gastronomy curriculum. Global citizenship is defined as

a sense of belonging to a broader community and common humanity. It emphasizes political, economic, social and cultural interdependency and interconnectedness between the local, the national and the global. (UNESCO, 2014)

Launched in 2012 together with the UN Secretary-General's Global Education First Initiative, global citizenship is also one of the UN's top three education priorities. Its core dimensions are cognitive, socio-emotional and behavioural (UNESCO, 2015). Within the first characteristic, the acquisition of knowledge, understanding and critical thinking about global, regional, national and local issues is identified, together with the interconnectedness and interdependency of different countries and populations. The sense of belonging to a common humanity, sharing values and responsibilities, empathy, solidarity and respect for differences and diversity is linked with the socio-emotional dimension. Finally, the behavioural aspect includes education to act effectively and responsibly at local, national and global levels for a more peaceful and sustainable world.

When including global citizenship into sustainable gastronomy education, the aim is thus to build the knowledge, skills, values and attitudes necessary for students to be able to contribute to a world with increased peace and inclusiveness. In order for this to be successful, a wide stakeholder buy-in, feedback from monitoring and evaluation processes and collaboration with the local communities should be included in the process (UNESCO, 2015). Here and in previous research (Allievi *et al.*, 2018) it is argued that such an approach to education can act as the foundation on which the implementation and achievement of SDGs can be built, with students having the potential to be very impactful in this sense, with an increased feeling of global citizenship being able to enhance the adoption of a systemic approach to food sustainability and security issues.

LEARNING LANDSCAPE IN SUSTAINABLE GASTRONOMY

Since Autumn 2014, food studies in the Bachelor's Degree Programme in Service Management at JAMK University of Applied Sciences in Finland have been focused on Sustainable Gastronomy. The aim is to educate responsible food citizens and active innovative agents able to work in various parts of the food chain. The aim is to look at the food system through the sustainable food system lens, a concept created by Blay-Palmer (2010). The process of creating and supporting Sustainable Food Systems is multi-layered and dynamic and calls for an understanding of both local and global implications, both from the consumer's and provider's perspective: this is the dialogue which we would also like to enhance through our programme. According to Blay-Palmer the sustainable food lens offers

a holistic vision of sustainability that goes beyond economic and ecological concerns and priorities by imagining a food system that nourishes one's body as well as one's cultural, spiritual and pleasure needs, to embrace priorities such as accessible, affordable, culturally appropriate, healthful foods. (Blay-Palmer, 2010: 226)

During the aforementioned studies (lasting 3.5 years for a total of 210 ECTS Cr), students learn to understand the food system and chain (Figure 1), their various components, stakeholders and phases. They will develop skills and competences for evaluating the effects of production, processing, logistics, retail and consumption of a product or service in relation to sustainability. After graduation, the students will be able to apply their skills and competences at work and really be the active developers of the food industry.



Figure 1. Logo for Sustainable Gastronomy at JAMK (Raulo, Junttila and Väisänen, 2013)

Learning to understand sustainability calls for a holistic view, system thinking and active dialogue between the stakeholders. Figure 2 introduces the defined learning landscape placing the student's learning in the centre and emphasizing the importance of dialogue between the various stakeholders of the society and education (Junttila 2014, 2019).

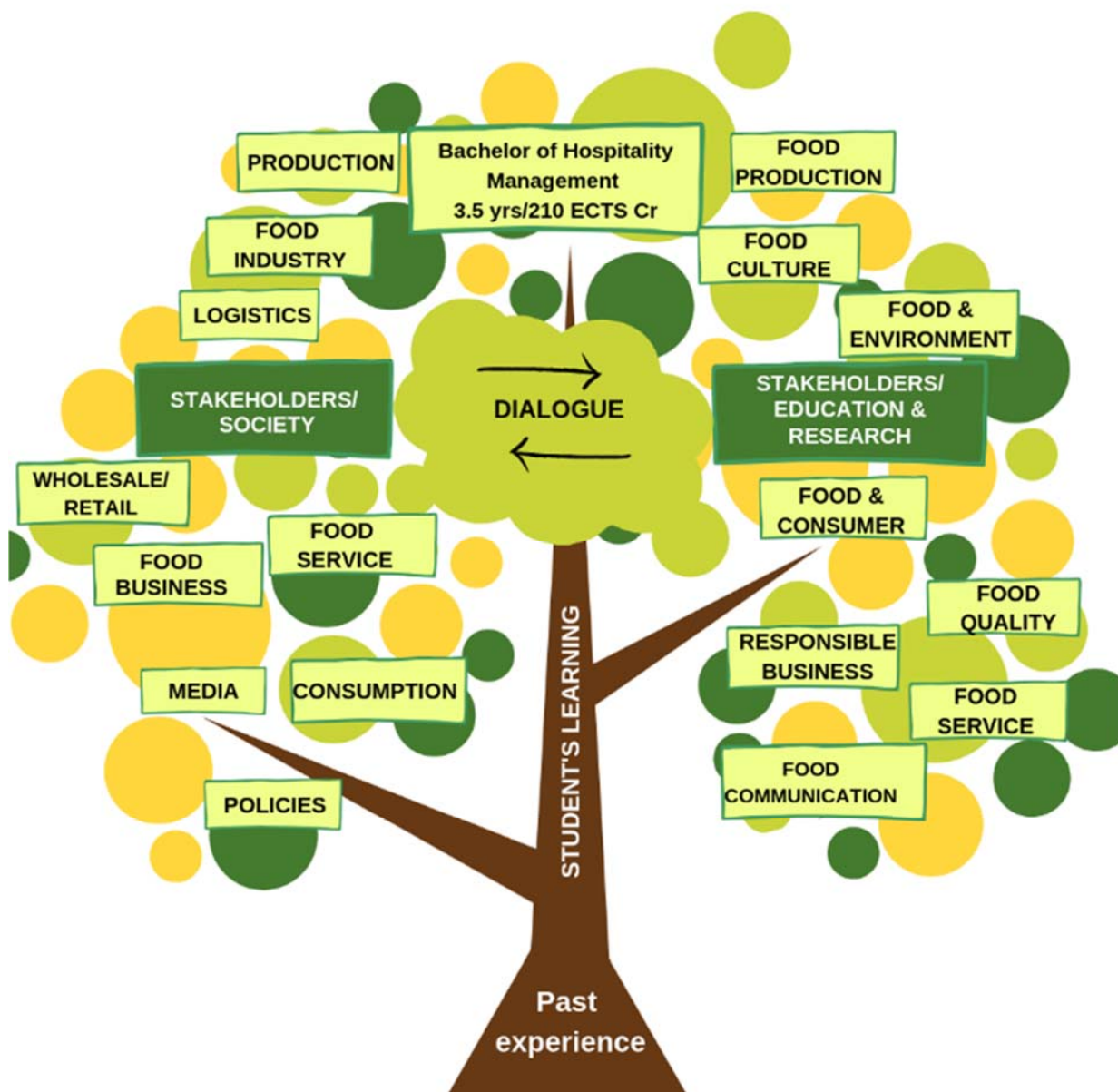


Figure 2. Learning Landscape for Sustainable Gastronomy at JAMK (Junttila, 2019)

SUSTAINABLE GASTRONOMY AND EXPERIENTIAL LEARNING: QUALITATIVE EVIDENCE GATHERED SO FAR

Figure 3 (below) presents the full experiential learning cycle starting from the student's past experience, moving to a concrete experience, continuing with a session of reflective observation (which can occur individually and / or in teams) and with the active experimentation and trialling of what is learnt, and ending with the actual work or study experience as the last step.

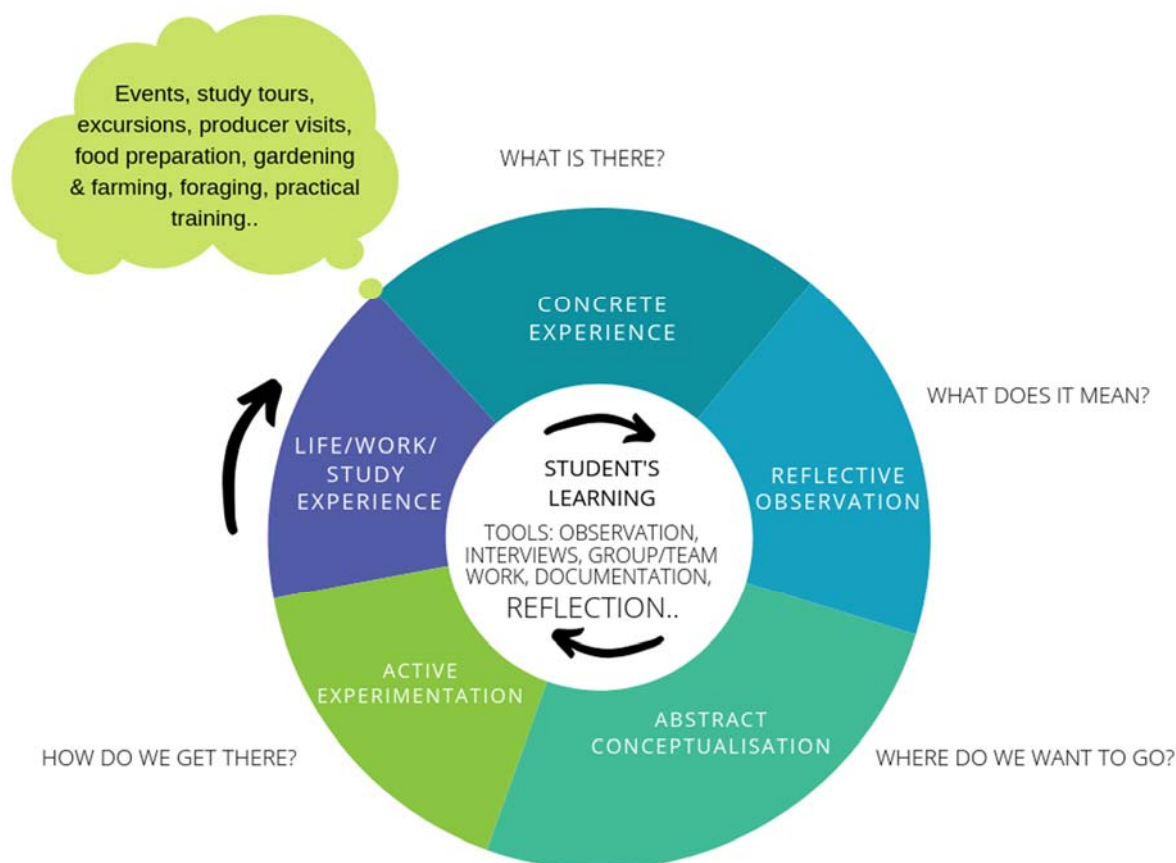


Figure 3. Experiential Learning Cycle at JAMK (Junttila, 2019).
(Adapted from Junttila and Väisänen, 2014; Lieblein et al., 2012 and Kolb, 1984)

The preliminary qualitative data was gathered through an ample variety of experiential learning experiences since the introduction of the Sustainable Gastronomy curriculum in 2014. As experiential learning requires mastering certain skills, it was something that needed to be guaranteed at the beginning of studies; at the same time, it was also a question of 'learning to learn' in higher education. For that purpose a Studio model was developed and implemented in Autumn 2014, and a more structured learning path was created through the enriched learning cycle. The chosen six skills of Observation, Dialogue, Documentation, Communication, Teamwork and Reflection were practiced through Studio culture: one skill per week, one repeatable structure to the day. Each Studio comprised of the Link (Link to previous week), the Showcase (Ideas presented through Pecha Kutchi talks), the Taster (a Workshop starter as an introductory task to the day), the Activity (the main Workshop activity), the Presentation (Presentations and Reflection on the day's activities), and the Synthesis (Synthesis and Link to the following weeks theme) (Junttila & Kay-Jones, 2015).

The process revealed four essential tools for delivering experiential learning. Firstly, having a *similar structure* for each day, and linking the sessions, gave the students an opportunity to see their skills grow and with it their confidence and motivation. Secondly, *Dialogue* is central: learning to evaluate, give and take feedback, and improve their argumentation skills ensures the development of autonomous learners. Thirdly, *ownership* is key: maintaining motivation is only possible by handing students over the ownership of the process and content of their study. Students should feel comfortable enough to experiment and fail, while studio group projects should be linked to individual projects in order to push students to excel and develop 'deep learning'. Finally, *places matter*: providing positive environments for

learning offers students the flexibility and inspiration to develop their motivation. Ownership can be embodied in co-creation spaces but more are needed. Dialogue can be fostered with the correct spatial atmospheres but smaller informal groups are required (Junttila & Kay-Jones, 2015).

The pedagogy chosen seems to foster the development of soft skills: via essays, discussions in class, assignments or blog posts students have expressed how their awareness of food sustainability issues has increased, and how they have applied systems thinking skills while developing interpersonal competences and strategic management skills.

THE WAY FORWARD - CONCLUSIONS

As JAMK will be introducing a new curriculum in Autumn 2020, there are possibilities to explore how Sustainable Gastronomy education can help to achieve SDGs. A monitoring programme will thus be established to assess (1) how SDGs can be included in the Sustainable Gastronomy curriculum; (2) how student's understanding of sustainability issues develops, and (3) how soft-skills are developed through the study years.

In order to tackle the first point of the monitoring programme, all the courses included in the curriculum will use SDGs as a framework for their content and guide students in making connections between the courses' content and the SDGs. Furthermore, students will be encouraged to work in teams and groups, as well as to participate in international events or case study competitions, to foster soft skills development and global citizenship.

For the second and the third part of the monitoring programme, the analysis will start with an assessment through present situation analysis on the students' skills and competences and understanding of sustainability. At the end of the first study year, in the first progress analysis, both quantitative surveys and qualitative one-to-one interviews will be used in order to assess the progress of the students. The authors will undertake a literature review during this first year, in order to understand which techniques could better suit the purpose of assessing soft skills development. The Curriculum 2020 first year studies will be also evaluated in relation to SDG and the required adjustments will be made.

The preliminary timeline for the different parts of the programme is presented in Figure 4.

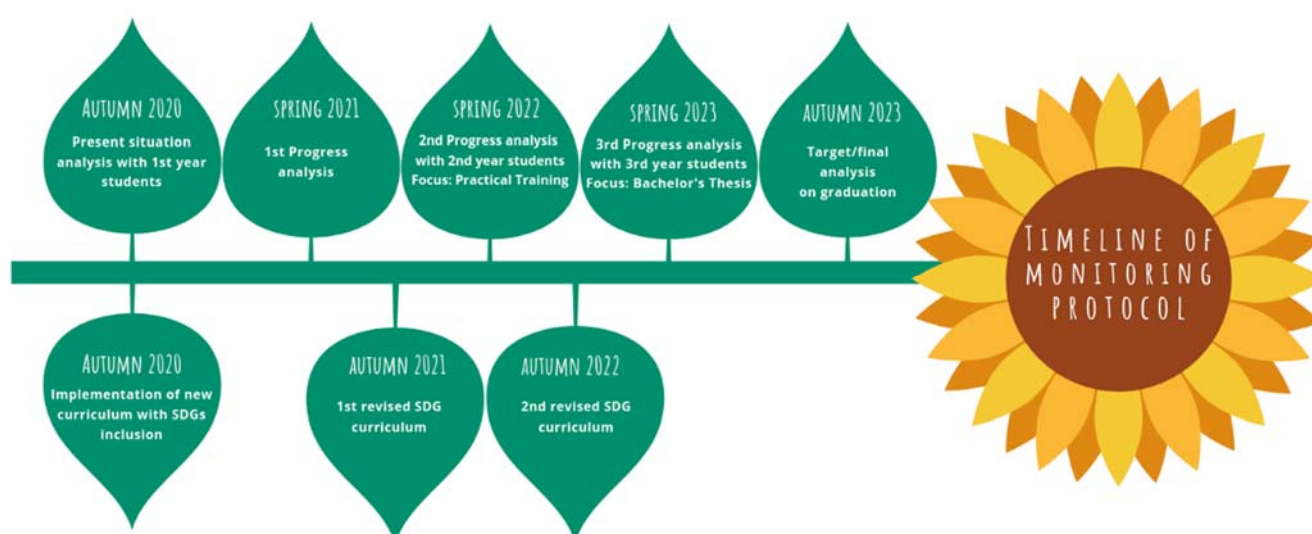


Figure 4. Preliminary timeline for collecting data in order to assess the success of the new curriculum.

At the end of both the second and the third study year there a progress analysis will be undertaken, with special focuses on practical training (2nd year) and Bachelor's Thesis (3rd year). Consequently, revisions to Curriculum 2020 will be made if so needed. On graduation, the target situation analysis will be carried out, and the results will be compared to the present situation analysis of the first autumn.

Developing the new Curriculum 2020 with SDG framework is currently in its early stages and the actual work begins in August 2019, therefore in this paper the authors have only introduced their work plan and theoretical framework. Given the potential of the educational approach described here in the context of the current societal challenges, the authors will continue to report their progress and results in future research papers.

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LIFELONG LEARNERS: ESSENTIAL CONTRIBUTORS TO THE HIGHER EDUCATION LIVING AND LEARNING COMMUNITY

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INTRODUCTION

This project is an exploratory study of lifelong learners and their contribution within a diverse learning community engaged in experiential learning while sailing around the world. This higher education organization consists of a unique learning environment in which a diverse student population comprised of students of all ages, from across the globe, live and learn alongside faculty, staff, and administration. This shipboard community is engaged in a joint enterprise designed to integrate education with exposure to a variety of cultures, people, and experiences. One subset of the academic community includes lifelong learners; these individuals bring generational diversity and professional expertise to the learning community, including the other students, “ship kids” and undergraduates, on board the voyage.

LITERATURE REVIEW

A community of learners requires that a group of students be “engaged in intellectual interaction.” (Cross 1998, p. 4). These three elements (i.e. engagement, intellectuality, and interaction) can be mapped into the three key elements of a community of inquiry – social presence, teaching presence, and cognitive presence (Garrison, Anderson & Archer, 2000). At this high functioning level of community, students not only feel welcome, comfortable, and connected, but they engage each other in rigorous discourse and dialogue; they are motivated and encouraged through professional guidance; and they build camaraderie through participation in casual, or non-formal, social interactions (Brown, 2001).

Adult learners are required to balance a variety of roles: student, family member, and employee, making student not their primary appointment (Flannery & Apps, 1987). Yet, participation by adults in formal higher education continues to escalate (Ginsberg & Wlodkowski, 2010). They come to this educational environment with diverse and disproportionate prior experience (Long, 2004) and participate throughout their adult lives.

METHODS

Participants and Setting

This study was conducted on a ship that acts as a floating university campus. It was a semester long voyage where college students participated in classes from professors in a variety of disciplines. During the semester, the ship docked in ten countries where the voyagers participated in experiential learning classes and field programs similar to excursions. Also studying on the ship are “ship kids”, children of the faculty and staff, and lifelong learners. Having this multigenerational learning community creates a support system for all participants and promotes learning through collaboration and the exchange of ideas, experiences, and

expertise. The lifelong learners are an essential element to the classes they audit (they do not receive college credit) and to this community. The organization stipulates that Lifelong Learners are 30+ years old, unless they are lifelong learning children accompanied by their parents, adult lifelong learners. The Spring 2019 lifelong learner population included adult learners from 34-78. Sixteen lifelong learners were registered for the semester long voyage, as well as an additional nine spotlight voyagers, these were lifelong learners who participated in a portion of the voyage - typically five-six weeks long. Fourteen lifelong learners and two spotlight voyagers participated in the study. Of the 16 lifelong learner participants, half were repeaters and had participated in previous voyages, although some of these were participants on brief voyages for special occasions.

Data Collection and Analysis

Lifelong learners were surveyed regarding their expectations for the voyage and at the end of the voyage regarding their experiences on the voyage. In addition to the surveys, informal conversational interviews took place throughout the voyage. The study was exploratory and the focus of the study was concerning the living learning community and the lifelong learners' role in this community.

Analysis of the data was initiated through the process of rudimentary analysis in order to record ideas as the data was collected and then progressed into the analysis phase of the research process (Merriam, 1998). A systematic coding process then began on the surveys completed by participants and the conversational interviews the lifelong learners participated in. This collection of data was all coded for the emergence of themes.

FINDINGS AND DISCUSSION

A qualitative analysis of the data collected produced the emergence of five themes, including 1. A focus on the significance of the students, 2. A common goal among the community of learners, 3. Extended family priority, 4. Multigenerational learning benefits, and 5. Experiential learning beyond the classroom. Participants in the study consistently discussed the significant role the college students played in their experiences on the voyage being a positive one: "I like the community, especially students." One participant, Nelle, was a repeat voyager and had previously participated in voyages with and without college students and commented that she would not participate in voyages without the college students as the experiences were not as fulfilling. Other repeat voyagers commented on their continued relationships with students from voyages years earlier. These students became friends with their entire family. One family of lifelong learners even had a student from an earlier voyage join them as a lifelong learner for this voyage. Several repeat lifelong learners mentioned that the students were the reason they were interested in participating again. Although repeat voyagers appeared to be familiar with the intense relationships they would build with the college students, first time voyagers did not comment on this expectation in their initial surveys, and it was clear in the end of voyage surveys that they were surprised by these relationships: "I was surprised how much the students desired to connect with me and how I enjoyed that connection" (Robyn). Often the relationships with students was listed as the "most memorable aspect" of the experience. Multiple lifelong learners commented on their relationships with students being more important than the relationships they had with other lifelong learners. One participant, Nelle stated, "I am equally, if not more, engaged with the students than with the other lifelong learners."

Lifelong learners participate in the voyage for a variety of reasons. For some, they are now retired so have the time and financial means to travel and like the educational component of this particular trip. For others, they participated in the program as college students and enjoy reliving the experience. However, the learning aspect associated with this program is definitely a draw. The idea of a common goal among the community of learners was a theme that emerged during the data analysis phase. The initial survey included questions regarding expectations for the voyage, including what they “expect to learn from this experience” and “expectations regarding the shipboard community”. The narratives often included the idea of communal and individual learning experiences and growth. Carrie’s expectations included becoming “a cohesive entity & grow together by sharing our cultural experiences & opinions.” She also offered advice regarding this common goal for the voyage stating, “students are experiencing everything for the first time and it would be good for LLL’s to be on a 1st time journey as a community.” This idea of a common goal of learning was considered in Jerry’s discussion of the learning community being a, “group of people connected by an interest in learning. It may encompass people interested in different subjects but requires the general mindset that there is something still to be learned.”

The lifelong learners coordinate the Extended Family Program onboard the ship. The program assigns college students to a “parent”. This parent may be a lifelong learner or lifelong learner family or a staff or faculty member and their family. The program acts as a support system for the college students as they have very limited access to their families at home. Family formations are intentional, attempting to pair students with parents and siblings they are not already connected with. For example, a faculty member is not assigned any of their students. The lifelong learners coordinate family dinners and events (i.e. Extended Family Feud). Families are also encouraged to facilitate their own gatherings as well, such as game nights, meals, movies etc. The program is optional, but during this particular voyage, the students overwhelmingly participated, compelling most adults (lifelong learners, faculty, staff, and administrators) to take on a family of six-eight students. It appears the majority of lifelong learners participated in this program and had very positive experiences as they repeatedly referenced their extended families and the various experiences they had together including knitting, travel, walks, fancy dinners, etc. In fact, the extended family was the impetus for one lifelong learner to return and sail again: “I loved the energy of the students on board and the LLL Extended Family Program. I wanted to experience these things again that so enriched my life” (Carrie). Nelle too thoroughly enjoyed the Extended Family Program referring to it in the end of voyage survey as the most memorable experience: “my extended family and the meals, craft projects, conversations and sharing between and amongst all 7 of us. Love having a family and those relationships.”

The extended family is just one reminder of the multigenerational learning experiences that happen on board the voyage. The benefit of this multigenerational learning community was the fourth theme to emerge during analysis of the lifelong learners’ surveys and interviews. One faculty member had four-year-old twins sailing with her and the oldest lifelong learner to participate in this study was 78. So, between the “ship kids” and the Lifelong Learners, this floating campus is definitely a multigenerational learning community. It is as common to witness college students tutoring the “ship kids” as it is for the college students to engage a lifelong learner in discussions about how they choose a career or how best to start a business. Every individual has an expertise that can be contributed to the community. Sally summed it up nicely in the following quote: “a group of people learning, teaching, experiencing together. All ages is a bonus.” Moreover, individuals from each of the various groups (“ship kids”, college students, faculty, staff, administrators, and lifelong learners) learn together both on and off the ship. Each of the aforementioned groups can participate in classes, lecture series, evening seminars, and

field programs, although the learning experiences may differ and/or what is experienced depends on the individual. "There are many, many learning opportunities with the program. Perhaps I did not take advantage of as many as I might have, but because of my age (70 y.o.) and my situation, I am content to experience some issues vicariously through students. This program makes that possible." (Sally).

An experience that extends beyond the traditional classroom to include experiential learning both on the ship and in port was the final theme to emerge. Lifelong learners have the opportunity to audit the various classes offered for the college students. These classes include a range of subjects (business, psychology, oceanography, education, writing, etc.) and are all classes offered at and approved by the partner university (a Research One institution). In addition, they have the opportunity to participate in or lead any number of other learning experiences the voyage offers such as the evening seminars each night that may focus on one of the port countries, personal improvement, environmental responsibilities, or numerous other areas of interest. There are also the various clubs that organize on board and educate other participants in their area of interest (religious organizations, news clubs, card game groups, exercise classes, etc.), and the community building events that take place on the ship such as the Sea Olympics (a comical Olympics with events such as Cheeto beards and Frozen t-shirt thawing) or Neptune Day (a maritime ritual when crossing the equator). Carrie highlighted this notion: "the learning community encompasses so much more than the traditional classroom setting ... the shipboard community is the key to advanced learning." Finally, experiential learning happens in port. The semester-long voyage visited ten countries. Voyagers are free to spend their time in port in any way they choose. However, there are organized field programs, similar to excursions, that the organization offers. Like all the learning experiences on the voyage, it is common to find participants from "ship kids" to lifelong learners on these field programs and participating in "independent travel" together. This time in country is an important aspect of the experiential learning opportunity provided on the voyage as classes are designed to integrate the various port countries into the class content. Although the organized programs require less personal planning and preparation than independent travel, due to the nature of visiting foreign countries and developing nations the time in port can be challenging. "I enjoyed the contrast between the comfort of the ship & discomfort of radically different shore time" (Robyn).

CONCLUSION

This exploratory study researched lifelong learners, and in particular one participant group of a semester-long educational voyage and their function in the shipboard community. This research was completed through a series of surveys with open-ended questions and conversational interviews with the researcher, a faculty member on the voyage. Analysis of the data highlighted the emergence of five themes: student impact, communal purpose, extended family, and multigenerational and experiential learning. Although other participant groups were not formally studied as an element of this project, it is clear from informal interactions that the lifelong learners are significantly valued by all community members and are an integral component of the shipboard community. This unique experience creates a multigenerational learning community designed to educate outside of the traditional classroom, and the lifelong learners are a significant educational resource contributing their wealth of knowledge and experience for the other voyage participants while also continuing their own lifelong learning.

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ENABLING LIVELIHOOD THROUGH GUIDANCE AND COUNSELLING IN UNIVERSITY LIFELONG LEARNING - THE IMPORTANT ROLE OF PROGRAM COORDINATORS USING THE EXAMPLE OF CONTINUING EDUCATION AT GERMAN UNIVERSITIES

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ABSTRACT

This paper looks into two interrelated hypotheses. The first presumption is that lifelong learning is an important contributor to, and even a precondition for, the livelihood of learners who have taken an unconventional educational path. Therefore, continuing education enables lifelong learning and program coordinators are an important mediator to enable continuing education through guidance and counselling. In this paper we want to showcase that program coordinators are the first and foremost focal point for students in continuing education to seek guidance and consultation. Coordinators have a variety of tasks to master, and guidance and counselling is one of the most important one. Program coordinators and students are working together through the entire student life cycle. In order to reinforce our hypotheses, the paper re-analysed data from two research projects to show how program coordinators support students in their professional and personal lives.

INTRODUCTION

In the last decade, University Lifelong Learning has been getting more and more attention in research, and continuing education programs have become more frequent in German universities (Bade-Becker 2017, 171). The implementation of these programs proves to be challenging for universities at all organizational levels (Seitter 2014, 141). The specifics of continuing education in Germany include defining non-traditional students¹ as a target group and the legal requirement of full-cost-calculation that results in demand orientation and a specific service orientation towards the (potential) students for example (*ibid.*; also Seitter 2017, 214). These specifics, which will be described later in this paper, require a structure in universities to support the overall program implementation. Decentralized program coordinators thereby play an important role (Gronert / Rundnagel 2018, 186).

This paper focuses on non-traditional students and emphasizes the role and function of program coordinators in continuing education programs. Program coordinators are essential in their role as intermediary actors. One of their central tasks is providing guidance and counselling to students. Program coordinators accompany students at every step of their educational formation. Because program coordinators are the first and foremost contact points, they are mostly confronted with the students' requirements and expectations. They can therefore be seen as an "One Stop Shop" (Hanft 2014, 116).

To test our hypotheses we reanalysed the data from the two research projects *Professionalization requirements of program coordinators* and *Counselling and Crediting*².

¹ Non-traditional students are students who do not take a linear path into university – e.g. they do not start university directly after high school graduation or do not complete it in the usual timeframe. They usually do not have the formal university entrance qualification and/or study part-time, participate in long-distance learning or take evening classes (Teichler/Wolter 2004, 72; also Schütze/Slowey 2002, 315)

² Both projects were part of a cross-university research and development project. For detailed information see www.wmhoch3.de

We took the data of 14 interviews with program coordinators and conducted a content-related analysis with a thematic focus on "guidance and counselling" using the student-life-cycle as an orientation.

Assuming that lifelong learning supports the livelihoods of non-traditional students, as lifelong learning is supposed to enhance participation in education, training and further education on all levels of the educational system and to limit the age-related differences and barriers (Wolter 2010, 55). We will argue in this paper that program coordinators enable lifelong learning in continuing education through guidance and counselling.

The first chapter of this paper describes the specifics of continuing education in Germany. The research methodology is laid out in chapter two. Building on these we will present the findings of the qualitative research projects to prove our hypotheses on guidance counselling as an important means for program coordinators to enable non-traditional students to take part and successfully complete courses in continuing education at university. In conclusion, this paper argues that program coordinators enable non-traditional students to take part in lifelong learning and therefore support their livelihood in general.

CONTINUING EDUCATION IN GERMAN UNIVERSITIES

Continuing education at German universities differs in several aspects from the traditional norm / understanding. While for traditional degrees academic self-governance and a certain supply orientation prevails (Kehm & Lanzendorf 2005, 52), continuing education is more demand-oriented and a managerial governance is more prominent (Wilkesmann 2010, 34). Contrary to the structure of universities that can be described as loosely-coupled with different levels of hierarchy (Kern 2000, 28), continuing education programs have a tightly-coupled structure. The implementation and communication at program-level have a strict hierarchy in which the program coordinator has an intermediary role (Gronert & Rundnagel 2018, 189, 196; Rundnagel 2018, 218) and serves as a central contact person, similar to a "one-stop-office" (Hanft 2014, 116).

An essential and very unusual feature of German universities - if you exclude non-traditional students - is the fact that all continuing education programs have to include a full-cost-calculation, i.e. all costs have to be calculated and generated through external funding, etc. (Seitter, 2014, 142). While traditional programs use a mixed calculation model / method with a very large part of the costs being paid by the government (Lermen & Vogt, 2018, 4), the continuing education programs have to finance themselves through tuition fees, grants or financial support, etc.

Undergraduate programs in German universities are free of charge and most of the enrolled students - most of them traditional students - start their studies directly after high school (Stöter 2013, 54f; Lewin, Vierthaler & Fraunhofer 2017, 160). Students targeted in university lifelong learning programs usually have an undergraduate degree or have completed a formation program in their field. They may already be working (sometimes for several years) in their job. They are often involved in family or care giving responsibilities, and have to pay tuition fees (Lewin, Vierthaler & Fraunhofer 2017, 160). These conditions lead to different needs and expectations both from students and universities.

RESEARCH METHODOLOGY

To validate our hypotheses, we combined the data of two research projects. The project *Counselling and Crediting* aimed to identify counselling needs and structures for target groups in and out of the university. The goal was to develop a concept to sustainably establish organizational structures that focus on counselling. The aim of the project *Professionalization requirements of program coordinators* was to generate empirical findings on the practice of program coordinators. A special focus was on the profession's tasks, training and requirements. The two projects encompass in total 33 interviews with staff members and two focus group discussions with students from three universities. This gave us a versatile overview.

In order to focus on "guidance and counselling" 14 interviews from both projects were analyzed for a second time using the categories from the project *Counselling and Crediting*. This survey method determined typical counseling concerns of students before enrollment (orientation phase), after enrollment (study phase) and after graduation. The data analysis was content-related with a thematic focus using a category system that outlined text passages with similar content. The main and sub-categories were derived from the respective interview outlines. The expert interviews were analyzed with the help of the software MAXQDA according to the content analysis method by Mayring (2003). Both projects were also analyzed separately to get deeper insights into the scope of each project. A three-step process was chosen to relate the results of the two research projects to the underlying hypotheses:

- (1) In a first step, we created categories deviated from the major findings of the *Counseling and Crediting* project.
- (2) In a second step, the categories were used to re-analyse interviews with program coordinators. Thus, 14 interviews with 12 respondents were used.
- (3) The data analysis was carried out according to the same methodology as in the two initial projects with a focus on "guidance and counselling" in continuing education programs.

The procedure is visualized in figure one.

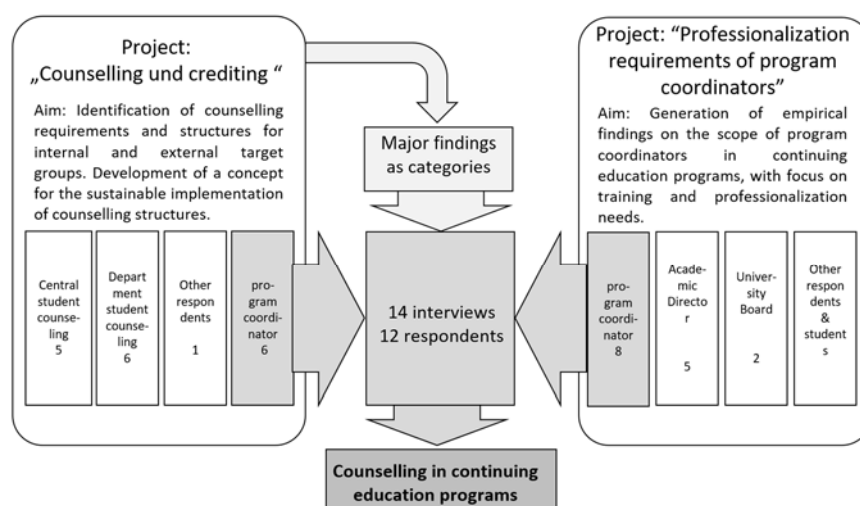


Figure 1 research design

The next chapter presents representative examples that were derived from the interviews with the program coordinators in continuing education programs. But first the next chapter gives a short introduction to the profession of program coordinators in general.

PROGRAM COORDINATORS – GUIDANCE AND COUNSELLING THROUGHOUT THE ENTIRE PROGRAM CYCLE

Program coordinators in decentrally-organized continuing education programs are essential in their role as intermediary actors. They have a variety of tasks: strategic management, marketing, financial management, admission and management of exams, quality management, lecturer support and management of internal and external partnerships (Gronert & Rundnagel 2018). A program coordinator points out: “I know the vita of all my students. We’ve discussed if they can successfully complete the program or not. I am with them through every academic and personal concern they have. I know their occupation, family status and problems. And I am the one handing out the certificates when they’ve finished. It is very different from working with traditional students.” (program coordinator 2, Abs.159). On the one hand this quote showcases the variety of tasks the program coordinator has, and on the other hand it shows how the program coordinator is involved in the students’ educational formation and personal life throughout the entire program cycle: from admission to graduation and beyond. In the figure below the main tasks of program coordinator are summarized and aligned to the steps of the student life cycle. This classification is merely for analytical purposes and emphasizes that guidance and counselling is an important task needed in every step of the student life cycle.

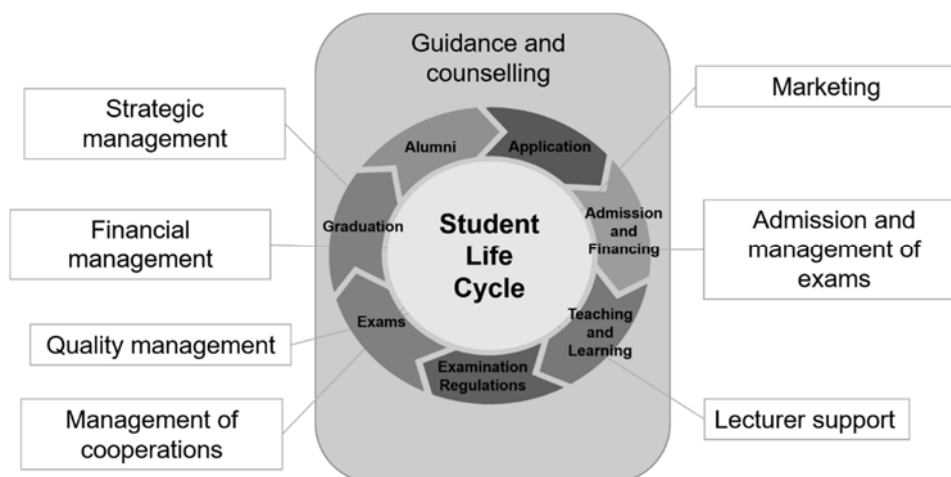


Figure 2 Tasks in student life cycle

To align our hypotheses with our findings we developed an overview of all identified concerns and requests presented by students which program coordinators mentioned in the interviews. To illustrate these, we’ve chosen four examples: admissions/financing, exams/exam regulations, graduation and alumni, which we will discuss in greater detail in this paper.

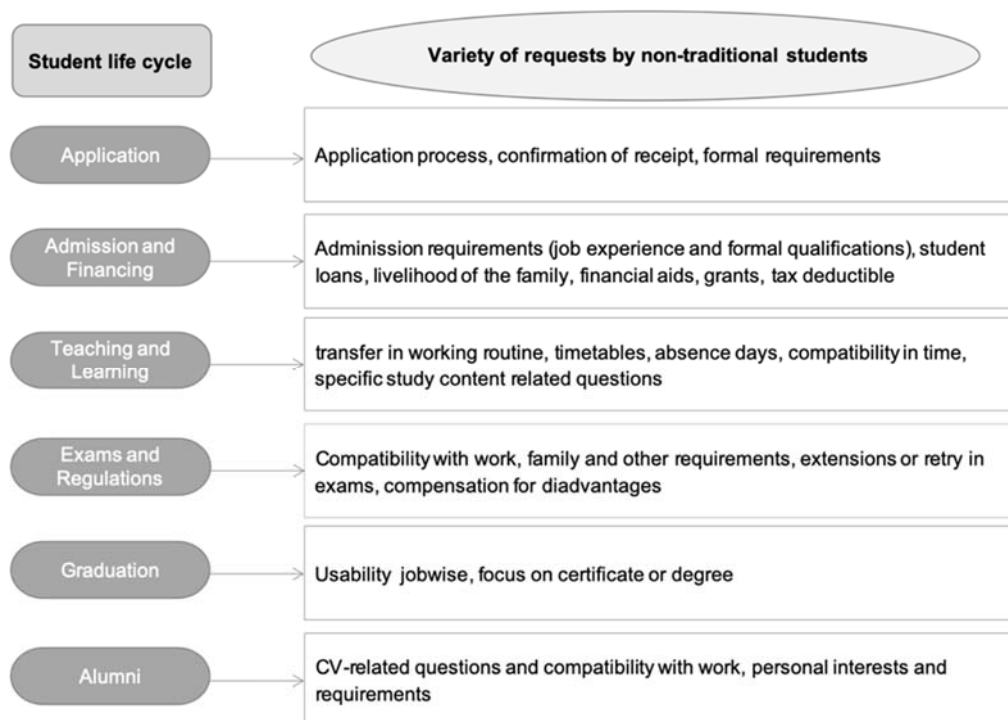


Figure 3 non-traditional student requirements

Admissions / Financing

Even before enrolling in a study program, guidance and counselling is very important. This is illustrated in the following quotation: “How long does the course take? Am I [the student] qualified to apply for the course and how onerous is the application process? These are basic questions; typical frequently asked questions we [the program coordinators] are faced with” (program coordinator 3, passage 53).

This shows that program coordinators must be able to provide individual and CV-related advice. They also assist the prospective students in making an important decision. For example, the students want to discuss how the course is structured so that it can be combined with family and / or occupational responsibilities, or what effect the decision might have on their partnerships and family lives.

At the same time program coordinators have to keep in mind the formal procedures of admission requirements and processes. In particular, the question of financing is of great importance. The interested students need advice on the question of “how they can finance their courses or if there are possibilities of assistance or sponsorship?” (ibid. program coordinator 4, Abs. 23). In addition to CV-related aspects, the program coordinators must also give advice on sensitive issues of funding for continuing education, like paying in instalments or if the student can afford the fees in general. Overall, there is already a high need for advice during the orientation phase which is very diverse and ranges from questions of formal processes to highly individual concerns of compatibility of the program with work and family.

Exams / Exam Regulations

During the study phase program coordinators must reconcile the expectations and needs of the student with the requirements for examinations and the course in general:

Of course the students will call and tell me that there is too much work to be done, for example at home or at work, or the children are sick and they can't finish the term paper on time. So, I can't just tell them that there is a deadline which they have to meet. My job is it to provide a service, to find a way within the framework of exam regulations through which they can hand it in later. It is my job to provide that service or to support the student in any other way. The important part is that we have to find a way to work within the exam regulations on the one hand and consider the needs and requirements of the student on the other hand".

Program coordinator 1, passage 84

Even if the program coordinator is mainly talking about exams and exam regulations, the focus is on the entire learning process and especially "creating the perfect environment to learn ..." (*ibid.*). It shows the arrangements the program coordinator has to make in order to meet the student's needs. In this quotation it is evident how the coordinator has to juggle the student's expectations and needs, and the exam and course regulations. A distinct service orientation becomes clear.

Graduation

The program coordinator is also involved in issuing certificates. The coordinator works together with the registrar's office and hands out the certificates personally. While focusing the analysis on "guidance and counselling" it becomes clear that program coordinators also give advice to students who are concerned with their future professional careers, as illustrated in this example: "The second question is, in what way will the course enhance my job opportunities? How does the course content match my professional qualifications? What benefits do I gain from taking part in the course?" (program coordinator 5, Abs. 13). One reason why students engage in continuing education programs is to achieve advancement in their current jobs or to be in a position to change jobs. The program coordinator is also providing advice on this matter. He or she has to be familiar with one or several professional fields. The certificate the students receive in the end enables them to get a promotion or change jobs.

Development after the course / alumni

Even after graduation and "handing out the certificates" the program coordinator stays in touch with the alumni. He or she stores the contacts in a database and contacts the students afterwards in order to talk about personal or occupational developments: "and they are happy when I call and ask how it all worked out in the end. Today for example I contacted an alumnus and asked if he got the job he wanted. He was very happy that I stayed in touch and that the university took an interest in his whereabouts" (program coordinator 1, Abs. 139).

On the one hand, this contact helps the program coordinator to improve the counselling provided regarding job or field-related topics, in that that he or she can use the information from this student feedback to give better advice to future students and to make a program more attractive due to the documented successes of its alumni. And on the other hand, it builds on the existing student-university relationship that can contribute to improving quality management or cooperation management purposes. It helps the program to develop further and be more effective for other students.

Discussion

This paper demonstrates that program coordinators enable lifelong learning in continuing education by providing guidance and counselling throughout the entire program cycle and beyond. The examples given prove that non-traditional students in continuing education programs have different needs and requirements which are addressed by the program coordinator through guidance and counselling. This article showcases that program

coordinators – in their function as a "one-stop-office" – are the main focal points for non-traditional students to raise their concerns and seek advice.

Program coordinators therefore are an important cornerstone that enable non-traditional students to engage in and successfully complete courses and programs in continuing education. Within the scope of this study we could verify our hypothesis that program coordinators enable lifelong learning in university continuing education.

Furthermore, it would be interesting to apply our findings to other fields or institutions in adult education in order to see if our hypotheses prove to be true under different conditions and different requirements. These findings can support the professionalization of program coordinators, as they illustrate the need for professional guidance and counselling skills. This task is one of the most important ones, but is also one with a great variety of sub-tasks. This leads to the conclusion that program coordinators have to be trained in all of the aforementioned tasks but especially in providing guidance and counselling with regard to the needs of non-traditional students. This paper might be a first step in this direction.

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HIGHER EDUCATION APPRENTICESHIP - DEVELOPMENT OF POLICIES TO PREPARE THE PROFESSIONALS OF TOMORROW

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on behalf of the ApprEnt consortium

ABSTRACT

Growing productivity of industrial work is resulting in high youth unemployment. At the same time skills requirements are changing: more high-level knowledge as well as experience-based competencies are needed. Hence, there is a particular need to promote and expand the capacity of work-based learning and apprenticeships. In this respect, the major challenge will be to reintegrate and synchronise the “working and the learning worlds” so that they understand each other better and cooperate in a more natural and useful way.

ApprEnt intends to bridge the gap between the worlds of education and business, enhancing partnerships that involve companies, Higher Education Institutions (HEIs) as VET providers, and other relevant stakeholders such as public bodies, representatives of learners and representatives of VET providers, with the ultimate aim of promoting the establishment of work-based learning and especially apprenticeship. With this aim in mind, ApprEnt has produced a set of policy recommendations on how VET in HEIs can promote the implementation of apprenticeships and work-based learning schemes and thus contribute to addressing the problems of unemployment and skills shortages.

THE APPRENT PROJECT

ApprEnt is a project funded by the Erasmus+ programme aiming to address two key challenges of today's education and training in Europe: **high unemployment among young people** and the **shortage of higher-level skills** required by employers. To respond to these issues ApprEnt tries to foster cooperation between higher education institutions (HEIs) and business and promote the establishment and improvement of work-based learning (WBL), especially apprenticeship schemes.

Higher education apprenticeships (HEAs) – and work-based learning schemes in general – are seen as a way to help learners gain a recognised professional qualification while developing experience in a real work environment, therefore increasing their future employability at a level appropriate to their knowledge and competences. For HEIs, apprenticeships mean improving the professional dimension and relevance of the curricula and teaching methods, accelerating exchanges with the business world and allowing an honest transition of students from education to work. For enterprises, HEAs can represent a way to attract more highly skilled people and bring about a smoother recruitment process.

ApprEnt has involved a mixed consortium of higher education institutions and Chambers of Commerce / Associations of SMEs in seven different countries with the aim of fostering the sharing of good practices and maximising peer-learning, transnationally in partner meetings but also in each partner country team, where focus learning groups of education institutions and business organisations have worked together with representatives of public authorities and learners contributing to the discussion.

From the point of view of University-Business collaboration, the ApprEnt consortium understood “HE Apprenticeship” as programmes that have all or a minimum of four characteristics out of the six listed below:

1. Learning alternates between the workplace and an education centre
2. Mentoring is a strong aspect preserved by the employer and the HEI
3. The programme is part of a formal or continuing education training
4. Successful learners receive a recognised certificate
5. The training involves signing a contract or formal agreement by the student
6. The apprentices receive remuneration in the form of wage or salary

The resources and tools¹ produced by ApprEnt include national reports describing the HE apprenticeship system in the partner countries, feedback collected through formal and informal exchanges organised at national level, 33 case studies of existing HEA practices including their transversal comparison, and a prototype training course for mentors and supervisors of HEA programmes.

When it comes to HEA, it is first and foremost important to consider that different scenarios exist in different countries and contexts: in some countries institutions have consulted key stakeholders and civil society and linked the strategy with existing initiatives; in other countries institutions do have basic strategies, but they are currently not linked with HE and SME collaboration; in some other countries, working groups or projects have been established in order to implement this collaboration; finally, there are examples of countries where apprenticeship in HE is in as yet only in pilot phase.

APPRENT POLICY RECOMMENDATIONS

On the base of the findings collected and the existing diverse scenarios, the ApprEnt consortium has proposed a set of key recommendations aimed at the promotion of WBL and apprenticeship schemes at higher education level, encouraging the concerted efforts of university, business and policy-making actors. The recommendations are based on the belief that HEAs are of vital importance nowadays since they bridge and strengthen University-Business collaboration and respond to needs and challenges experienced by all the main stakeholders concerned: policy-makers at European and national level, higher education institutions, enterprises, and learners.

The policy recommendations focus on four different target groups: EU policy makers, national policy-makers, higher education institutions and enterprises. They illustrate the action that each actor should take to improve HEAs in the specific area addressed.

Besides the exchanges held by each project partner with key actors and stakeholders at institutional, regional and national level, ApprEnt has organised several formal consultations around the draft policy recommendations in order to validate them and take on board as many relevant views as possible.

On 14 May 2019 an online consultation was held with 15 participants from higher education institutions based in Austria, Estonia, Finland, Germany, Italy, Spain and Russia. On 23 May the draft policy recommendations were presented to key stakeholders in Brussels during eucen’s 2019 Policy Talks. The participants, coming from different EC bodies and European NGOs, were keen to discuss the relevance and potential impact of the policy paper. A second face-to-face consultation was held at the University of Tallinn on 28 May 2019,

¹ All tools and resources are available for free on the project website: <https://apprent.eucen.eu/tools/>

where invited guests representing the worlds of Estonian business and higher education contributed their knowledge and experience in relation to business-university cooperation and work-based learning and apprenticeship schemes. Finally, on 6 June 2019 the policy recommendations were discussed in a dedicated session organised within the 51st eucen Conference in Aveiro (PT).

The **10 main areas** of action covered by the ApprEnt policy paper are the following:

- Regulations
- Strategic policy-making
- Training
- Mobility
- Guidance and coordination
- Quality assurance
- Allocation of resources
- Funding companies
- Transparency
- Sustainability

Regulations

The first ApprEnt recommendation is to establish a clear definition and transnational understanding of higher education apprenticeships, clarifying what distinguishes them from other schemes, such as internships and traineeships. This should cover quality issues and expected outcomes. A clear definition of higher education apprenticeships is needed to allow institutions, enterprises and students to set up arrangements in the EU for mobility while guaranteeing some minimum standards that would improve the students' skills in a recognised way in all member states. While it is in the power of EU policy-makers to set up the needed transnational regulations, it is up to national states to adopt them, taking care of their adaptation to the national context. Having testing the adopted regulations, higher education institutions and enterprises would send their feedback to policy-makers and contribute to any needed refinement of the regulations concerned.

The benefit of having unified standards and criteria for HEAs is clear: students will have a much clearer understanding of what a HE apprenticeship consists of, in comparison to other schemes; they would also have the guarantee of developing specific skills within the specific degree course; finally, they would be sure that the skills they develop would be recognised in any EU country.

Strategic policy-making

The development of HEAs should be part of an overall strategic goal to integrate work-based and vocationally oriented learning within academic learning / general education. A distinct policy vision and package for apprenticeships within the higher level of education is needed, which should obviously consider, at national level, the specific context. While the responsibility of setting up this strategic vision and package stays with the policy level, it would be up to higher education institutions and business to implement the special policy measures, create coordinating efforts and resources, and encourage students to participate. Considering the growing importance of work-based learning, the professionalization and professional development of workplace mentors should be one of the goals in education strategy as well as in governance of economic affairs.

By ensuring that HEAs are part of a coherent and integrated strategy, all students will benefit from opportunities of apprenticeships within both formal and continuous education programmes.

Training

In order to guarantee quality higher education apprenticeships, it is fundamental to ensure that mentors² in companies and HEIs have the pedagogical skills and competences needed to guide and support students, and that they are provided proper training. It would also be necessary to standardise the training of mentors so they understand the nature and use of apprenticeship programmes. Mentors would (a) be prepared for making the students the centre of the learning process and (b) learn themselves how to work and collaborate with other mentors from the business sector and from HEIs.³

Policy-makers at EU level can do a lot to provide policy, financial and logistical support to countries prepared to regulate training for mentors, while national policy makers should promote and encourage training for mentors with national awards or advantages and develop a mentors' network. They could also provide financial and logistical resources to HEIs and companies. But it is ultimately up to HEIs and business to introduce and encourage training for mentors and feedback networks, allocating adequate time and resources and offering "compensation in kind" (time or credits). In general, full recognition of the mentors' role and competences should be actively and efficiently promoted.

If proper training is provided to mentors, students will be able to receive supervision from prepared professionals who understand the challenges of apprenticeship programmes. They would be guided by both an academic / theoretical and a more practical mentor in order to find synergies between the two worlds and understand the circularity of both types of learning.

Mobility

In the view of the ApprEnt consortium, the mobility aspect is of key importance in the context of the training to be provided to mentors. Mobility schemes should be supported for academics and non-academics involved in HEA schemes at regional, national or international level. Ideally, the length of mobility periods could be between one week and three months. Institutions and enterprises should be encouraged to welcome and support visitors as well as to promote mobility amongst their own staff.

Students would benefit from interacting with staff that have experienced mobility and can explain the benefits of these opportunities. Staff could also explain to students how to prepare for these kind of exchanges.

Guidance, coordination and assessment

Dedicated and permanent 'orientation and guidance' spaces (both online and face-to-face) should be established, linking enterprises, HEIs, mentors and students, in order to provide information about HE apprenticeship schemes and ensure smoother administrative processes.

² Mentors (from SMEs and industry) and supervisors (from HEIs) are both called "mentors" in this document, as a global concept. It is very important to understand that we refer to both individuals.

³ ApprEnt has developed a generic prototype structure for a Continuing Professional Development (CPD) course that intends to give potential users the basis for training mentors of HEA programmes. Being a generic prototype structure, the course gives enough guidance and, at the same time, flexibility so that any institution / organisation from any country can adapt the model and its contents to their own needs, taking into account not only the national legal constraints but also institutional / organisational limitations (especially those connected to time and resources). The prototype course is available on the project website: <https://apprEnt.eucen.eu/tools/>

Suitable assessment methods and tools should be in place to monitor the learning achieved (e.g. the use of ePortfolios and / or periodical common reflection sessions).

Proper guidance, coordination and assessment mean that students will have access to better informed and supported mentors in their apprenticeship courses; they would move from isolated individual learning to network-based and collaborative learning, involving systematic meetings of students, mentors and, if necessary, people from the administrative offices.

Quality Assurance

It should be the responsibility of all the actors involved in HEA schemes to ensure quality placements where apprentices learn and are prepared for their future working life. Appropriate quality criteria should be designed involving the needs of both sides – HEIs and SMEs, considering knowledge-based analysis for future labour market and skills needs, ensuring the quality of the training of the mentors. The quality measures created at EU level should be adopted at national level and given adequate publicity, ensuring that those who apply quality control measures are awarded.

Students will benefit from work-based learning placements that are designed and implemented according to clearly established criteria that ensure quality assurance.

Allocate resources

Promoting work-based learning (WBL) and apprenticeship positions for young undergraduates and graduates means making more resources available to support them. At EU policy-making level this entails the possibility to launch a publicity campaign, as well as the funding of more projects that promote work-based learning and apprenticeship schemes. At national level, policy-makers could give tax discounts to employers who use these types of placements. HEIs should organise information sessions every year for both internal and external audiences, while enterprises should prepare detailed descriptions of the skills needed by the apprentices to enable HEIs to identify suitable candidates. It would help to work out new and collaborative pedagogical tools based on a clear and context-specific conceptual / theoretical framework, to be used by both the company and HEI mentors.

If adequate resources are allocated to promote and implement HE apprenticeship schemes, students would have more opportunities to apply for and participate in WBL or apprenticeship programmes, and they would be able to access WBL and apprenticeship programmes which are better resourced and of higher quality.

Funding companies

No progress can be made unless enough European and national funding and support is provided to countries implementing the European regulations for apprenticeship programmes. As for HEIs and enterprises, they should be responsible for allocating in the annual budget a section to improve and enlarge apprenticeship collaboration (e.g. in terms of training, time and / or dedication of staff, etc.).

If adequate funding is granted to support apprenticeship programmes, students will benefit from better quality schemes, and be supported by mentors who can devote an adequate amount of time and resources to them, since their role and functions are fully recognised and funded.

Transparency

Ensuring transparency requires the relevant actors to monitor, compare and share implemented actions, including the expenditure required for the implementation of HE apprenticeship schemes, pedagogical methodologies, learning outcomes and assessment criteria. EU and national policy makers should request annual reports from EU member states adopting the European regulations that receive some sort of funding. They should assess use of the funding and the quality of programmes funded. HEIs and enterprises would have the responsibility to prepare annual reports highlighting how the funding received has been used and doing an analysis on number of students, academic success rates, job placement rates, etc. All this would allow those involved to share good practices, compare practices across countries and ensure benchmarking.

Students will obviously benefit very much from schemes that are clear, understandable, fair and accountable.

Sustainability

The last recommendation embraces all the previous ones and refers to the sustainability of the whole system. This can only be ensured if permeability between levels is fostered and flexible trajectories and mobility are promoted. This also means fostering a long-term vision and enduring actions. Two different levels of sustainability have to be borne in mind: regulatory and applied. This means continued support of the training of trainers, both from companies and from HEIs, and legislating, regulating and implementing measures to ensure that short-term actions can take place.

In a sustainable system, students will benefit from permeability between learning pathways and from enhanced mobility. They will also benefit from schemes that pursue a coherent long-term, flexible vision and are not subject to frequent reshuffling.

OTHER APPRENT POLICY TOOLS

In addition to the set of policy recommendations illustrated above, the ApprEnt consortium has developed two more policy tools:

- Guidelines for a Higher Education Apprenticeship Model Agreement
- Advocacy Pack for Higher Education Apprenticeship programmes: by learning you teach, by teaching you learn

The **Guidelines for a Higher Education Apprenticeship Model Agreement** are based on the awareness that a good preparatory setting up will make the apprenticeship period a better experience for the company, the apprentice and the HEI. One key component of this preparatory set up is the design and signing of an agreement that binds all parties in a common objective. The Guidelines have been designed to support the three main parties involved in the HE apprenticeship scheme, and to clearly define the objectives of the placement, the expected achievements and the general conditions that define the apprenticeship period.

When discussing the design of this tool, it became clear to the ApprEnt consortium that designing one unique model would be a challenge because each country has different laws and cultural features, and each institution is governed by different rules. The best tool would therefore be a guide to help the reader understand the importance of the different points that should be ideally included in the model. The users can then decide what suits them and what does not, and design their own model.

The model also includes a sample model agreement, which integrates all the recommended points. Although this is not a real model (i.e. it has not been used by anyone yet), the objective is to show readers a way of wording the suggestions proposed in the guide.

The **Advocacy Pack** has been created based on the awareness that although HEAs have been proven to offer valuable solutions to some of the current societal challenges, while addressing the real needs of industry and preserving the academic requirements of higher education institutions, more is needed to make this reality known and make all concerned stakeholders aware of the benefit and usefulness of HEA schemes. Apprentices, enterprises, universities and policy makers can use the pack to promote and give visibility to any HEA available in their communities or / and in Europe.

The Advocacy Pack includes:

- Flash-cards highlighting the benefits of these programmes, with comments from real users:
 - Addressed to potential apprentices
 - Addressed to mentors
 - Addressed to HEIs
 - Addressed to enterprises
 - Addressed to policy makers
- Set of Policy Recommendations
- Guidelines to develop an Agreement Model
- Generic training course for mentors

All ApprEnt tools and outputs can be found and downloaded for free on the project website: <https://apprent.eucen.eu>

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PART 2

VINCE Final Symposium | Barcelona, 14 November 2019
“Validation for inclusion of New Citizens of Europe”

TOOLS THAT HELP MAKE A DIFFERENCE IN THE LIVES OF PEOPLE – THE VINCE PROJECT

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INTRODUCTION

Europe has seen in recent years how the number of newcomers and refugees who want to settle in our countries has increased. These individuals, generally escaping from wars or critical life conditions, are looking for a new life and opportunities for themselves and their families. Amongst the numerous challenges that they face, the lack of credentials and legal permissions to stay in Europe, make their access to labour market or the possibility to continue studying almost impossible. As a consequence, their integration into the hosting societies slows down and creates dissatisfaction and frustration both for the newcomers and for the European nationals (who might perceive the newcomers as a burden - see *Figure 1* below). Although newcomers are often educated and skilled, their competences may not be recognised in the host society either because their documents are missing or because their national qualifications are not totally comparable to those awarded in Europe.

Taking this real situation into consideration and knowing that the newcomers will have to be helped at some point by European professionals until they find a suitable job or career path, the VINCE project aimed to give to higher education (HE) staff - especially those professionals working in the validation of non-formal and informal learning (VNIL) - a set of tools to deal with the extra difficulties of assessing migrants and refugees enrolled as candidates in a validation processes in Europe.

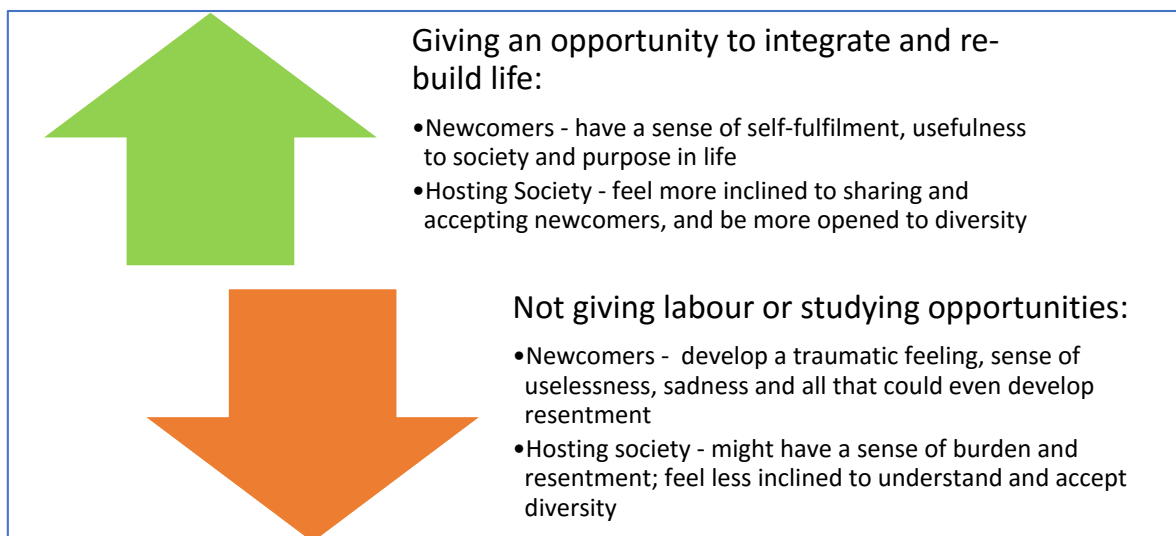


Figure 1 Giving or not opportunities affects newcomers and European citizens. C Royo, eucen, 2019.

The VINCE project, funded under the Key Activity 3 funding programme “Support for Policy Reform – Social inclusion through Education, Training and Youth” (Call EACEA-05-2016), run for three years and was integrated by 13 partners from 11 different European countries. The consortium included NGOs, Associations, HEIs and VET providers.

WHY IS 'VALIDATION OF NON FORMAL AND INFORMAL LEARNING' AN INTEGRATING TOOL?

VNIL is a powerful tool for social inclusion that gives a second chance to individuals. This alternative route into higher education could help those who have been denied the opportunity to enter further studies for a variety of social, political, legal or economic reasons, or those who have had to stop their studies and abandon their homes/countries. The VNIL processes ensure that candidates are recognised for what they have learned during their working life or, their life experiences more generally. It helps candidates to identify, analyse and evaluate what they have learned from experience, relate it to formal studies and construct a claim to have their acquired knowledge recognised. In summary, VNIL is about being fair and giving credit to an individual's self-growth regardless of the candidate's origin or background.

VINCE shows how the VNIL can be used and can be useful as well, enhancing relations between HEIs and newcomers particularly, and increasing trust between the staff from HEIs in general and these new arrivals who know little or nothing about the education system in their hosting country and/or the institution that accepts to recognise their previous studies or skills. In addition, the individualised processes of VNIL is ideal for newcomers, allowing them to receive the attention and help they need.

VINCE has generated a transfer of knowledge about Europe, the welcoming country, the education system and the specific institution dealing with the new arrivals, and has brought an improved reflection among the members of staff of HEIs using the project outputs about the situation and feelings of displaced people.

The VINCE products can make newcomers better understood and helped. The final objective is to give tools to the EU countries' professionals to understand the skills and knowledge of new arrivals so newcomers are equipped with at least the basic validation that allows them to enter the working environment and feel better integrated and more useful to their families and to the arrival country. Our professionals, therefore, must be recognised for their work - their existing skills and experience should be acknowledged but they need to be helped to prepare themselves properly for "different" types of VNIL candidates, so training is imperative.

Formal legislation and regulations at European, national and institutional levels should be enabled, especially if a system of validation is expected to be harmonised throughout Europe.

LEARNING FROM THE IMPACT OF VALIDATION IN THE NEWCOMERS' LIFE

VINCE has collected a number of testimonies from students who had undergone (or were in the process of completing) a validation process. The two testimonials below are a small sample that show how validation/recognition processes can change the newcomers' life¹:

- a) *Before I was constantly wondering if I was as valuable in Norway as I was in Iraq. The thought of going back to my homeland was always present. I applied for all kinds of jobs, from garbage collector to social worker. I wrote about 400 work applications without receiving a proper answer. When I thought about studying, I thought that I would have to start from scratch, and I did not want to say aloud that I had an education.*

¹ Real testimonials collected by NOKUT.

Now I feel that I am as valuable as before [in Iraq], and that Norway appreciates my background and effort. Now I do not think about going back home, I am happy about my work, and the future of my daughter is omnipresent. After receiving my recognition I chose only to apply for relevant jobs, I only wrote about 10 work applications, and was called in for four job interviews. I actually had to turn down two job offers! Now when I am thinking about studying I am only thinking about doing a Master's degree. Moreover, most importantly of all, I can shout out that I do have an education! The Norwegian Directorate for Immigration gave me as a refugee a future in Norway, and the recognition from NOKUT gave me my past back in order to have a better future.

- b) *These documents [the recognition certificates] are my securities. They show that I am a good person who has studied, and a person who wants to work and contribute to the society. You need to have an evidence of that, and these documents are my evidence. This gives me the opportunity to continue studying. It states among other things where I did my previous studies. My greatest hope for the future is to be well integrated into the Norwegian society. I owe Norway so much for choosing me as a quota refugee. When you receive an opportunity like the one we have received, you have to show that you are able to work hard and do your best.*

METHODOLOGY OF WORK USED IN VINCE

Apart from the transversal work, the project can be divided in 4 different phases as shown in *Figure 2*, which include empirical work, desk research, interviews and extensive peer learning sessions.



Figure 2 Working phases of VINCE. C Royo, eucen, 2019.

TOOLS TO HELP HIGHER EDUCATION STAFF TO UNDERSTAND NEWCOMERS AND DO BETTER VALIDATION PROCESSES WITH THEM

VINCE has developed six main outputs:

Interactive Platform

The VINCE platform is addressed to validation professionals who can use it as a source of resources. Newly arrived migrants and refugees might find it useful to know more about the process of validation. The platform is available in EN, FR and DE <https://vince.eucen.eu>

Country profiles

VINCE has revised and updated the country factsheets developed by eucen's project OBSERVAL-Net² into a new set of 33 country/region profiles illustrating how VNIL practice and procedures in HE are implemented all over Europe. The new country profiles can be accessed from the interactive platform <https://vince.eucen.eu/validation-in-europe/>

Case studies of validation practices

VINCE has collected 68 cases in total (58 collected by the consortium and 10 accepted as cases for the VINCE VNIL Award 2019). These documents illustrate experiences of validation professionals and refugees regarding validation and recognition procedures. They are accompanied by a Commentary Report which summarises the main features of the collection and draws key conclusions and recommendations. All the cases can be accessed from the library at the interactive platform <https://vince.eucen.eu/vince-case-studies/>

Guidelines for Higher Education staff to help migrants and refugees

The VINCE guidelines are templates for HEIs, containing frequently asked questions (FAQs) from refugees and migrants concerning 5 different areas (Welcome to Europe, Welcome to this Country, Welcome to Higher Education in Europe, Welcome to this Institution, Welcome to Validation). HE professionals can use the templates and adapt them based on their country's and/or institution's specifications/needs. The templates are available at the interactive platform in EN, DE, DK, ES, GR, FR, IT, NL, NO, SI, HU and can be downloaded for direct use or adaptation <https://vince.eucen.eu/guidelines/>

Prototype Training Course for Higher Education staff to help migrants and refugees

VINCE has developed a generic Professional Development Course (CPDC) which aims to provide the reader with insights and ideas for developing staff training for validation professionals who work with candidates from other countries during their adaptation processes to our society. It contains references to the other tools developed by VINCE and examples taken from the case studies' collection. The prototype is available at the interactive platform and is available in EN, FR, DE, DK <https://vince.eucen.eu/vince-training-course/>

Policy Recommendations

The VINCE recommendations propose ways to deal with the recognition of the skills of newcomers. The document is addressed to policy makers, HEIs/VET institutions and newcomers in Europe. This document is available from the interactive platform in three languages: EN, FR, DE <https://vince.eucen.eu/policy-recommendations/>

² <http://observal-net.eucen.eu>

POLICY RECOMMENDATIONS TO PLAN FOR A VALIDATING EUROPE

The policy work carried out during the project (including public online and face-to-face consultations with external stakeholders) confirmed the appropriateness of the 8 priorities of validation of non-formal and informal learning identified by VINCE. *Figure 3* below shows a summary table pointing out which levels (i.e. policy makers, VNIL professionals or newcomers) would value more each of the recommendations:

VINCE IDENTIFIED PRIORITIES	Policy makers level	HEIs-VET VNIL professionals level	Newcomers level
1. Communicate / Reach out to inform newcomers about VNIL and encourage its use	✓	✓	✓
2. Engage decision makers to commit and invest in VNIL for newcomers faster integration	✓	✓	
3. Be flexible to make the process adaptable to cultural, language and other constraints	✓	✓	
4. Train the professionals to deal with “unusual” candidates and give them useful tools	✓	✓	
5. Speed up the processes for newcomers to make them active members of society	✓		
6. Reflect and self-assess to estimate how VNIL can be improved. Refine processes		✓	
7. Monitor success, progress and further needs of VNIL transnational. Compare results	✓	✓	
8. Build community to allow sharing of experiences, tools and knowledge and to allow helping each other		✓	✓

Figure 3 Table extracted and expanded from the full VINCE Policy Recommendations paper³

The VINCE policy recommendations are meant to reach policy makers, especially in an attempt to make an impact on European policies. The recommendations are very focused on the eight priorities, the key elements to be addressed, and shows why each element is important and which is the final objective of each recommendation.

The VINCE policy recommendations paper has been prepared in a generic way, in order to allow potential users to adapt to their national context and needs. The interactive platform offers open access to the full paper in different languages.

³ C Royo, F Uras (eucen) on behalf of the VINCE consortium (Ed.) (2019): Policy analysis and recommendations: the VINCE contribution to a more integrated Europe through validation. ISSN 2664-4789 <https://vince.eucen.eu/policy-recommendations/>

CONCLUSIONS

The efficient integration of newcomers within their European hosting countries is a key element to making our society more balanced, fair and sustainable. The validation of newcomers' qualifications and skills enable refugees and migrants to access the labour market or pursue further studies as quickly as possible after their arrival, thus giving them a sense of purpose and more dignity, and at the same time liberating the hosting country from special social care that otherwise newcomers will need.

In this sense, higher education institutions can help by informing newcomers about the opportunities that validation offers and by providing the tools and training to validation professionals to address the specific needs of newcomers who decide to start their validation process.

Decision-makers, however, are ultimately responsible for embedding and validating measures in national regulations that enable the implementation of VNIL processes for newcomers and give enough visibility to the VNIL opportunities. These actions would encourage (a) institutions to invest in the staff involved in this area and (b) individuals to opt for VNIL route as an option for their career.

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VINCE policy recommendations <https://vince.eucen.eu/policy-recommendations/>

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COUNSELLING FOR THE RECOGNITION OF FOREIGN QUALIFICATIONS IN AUSTRIA: THE OFFERINGS OF THE COUNSELLING CENTRE FOR MIGRANTS IN VIENNA (CCfM) AND AST-NETWORK

Aleksandra PANEK, Counselling Centre for Migrants in Vienna (AT)

ABSTRACT

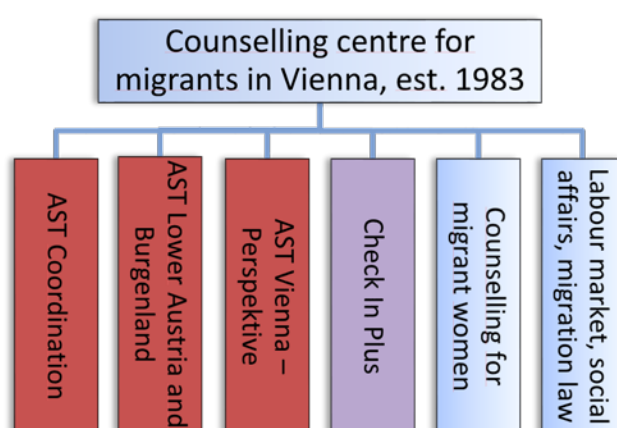
The Viennese Counselling Centre for Migrants (CCfM), an NGO, and other NGOs in Austria are offering Contact Points for people who gained professional qualifications abroad (AST). The countrywide AST-network has been providing counselling around the recognition of non-Austrian qualifications since 2013. This counselling supports migrants to validate their know-how and, in particular, to enhance their employability to match their existing qualifications. To reach this goal, many steps are needed. One of the steps can be provided by the additional offering of Check In Plus (CIP) by CCfM in Vienna.

In this paper the background of counselling for the process of qualifications recognition will be described: the counselling process itself, the target group, goals and principles, as well as Austrian conditions for recognition, will be outlined.

Key words: Austria-wide, counselling, migrants, procedure, qualification, recognition, refugees, service, measure-set.

INTRODUCTION – ORGANISATIONAL, HISTORICAL AND GEOGRAPHICAL BACKGROUND

The CCfM in Vienna was established as an NGO in 1983, and is one of the oldest NGOs in Austria dealing with the issues of labour market policy for migrants. The focus was originally on migrants from Turkey and former Yugoslavia. Currently, there are six sections of CCfM:

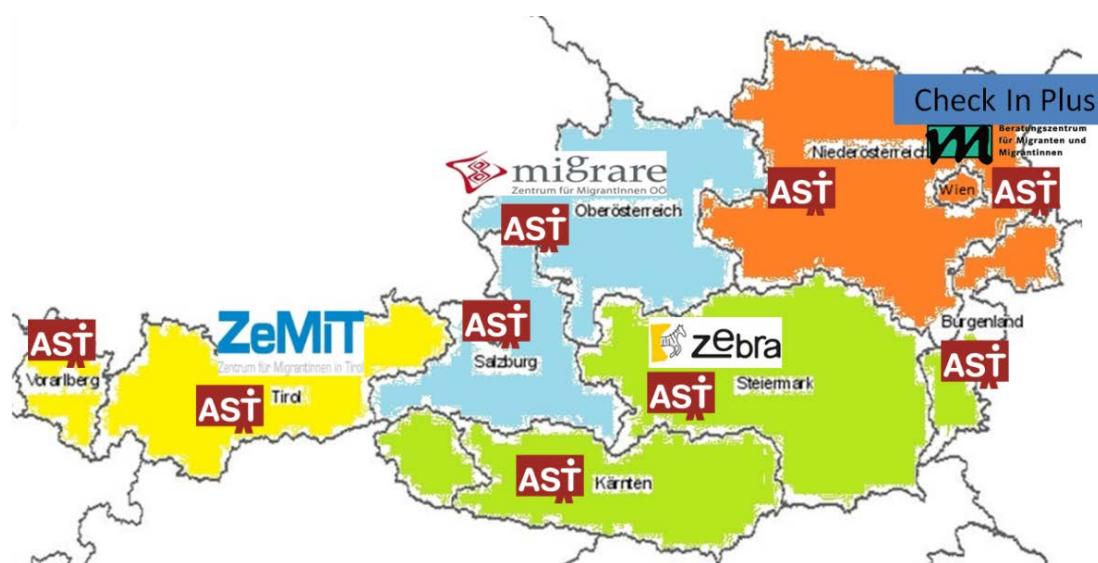


The organizational chart of CCfM in Vienna (red and purple sections provide recognition and education counselling).

During the 1980s another three Austrian NGOs were founded to support migrants: ZeMiT in Innsbruck, Zebra in Graz and *migrare* in Linz. Since being established all four NGOs have specialized in counselling for specific target groups and issues: female migrants, social affairs, employment, social and migration law, etc.

During the early 2000s a strong need for counselling on recognition of foreign qualifications was observed. CCfM started with *Perspektive – recognition counselling* in 2006. At the beginning of 2012 an inter-ministerial *Recognition of foreign qualifications* task force was formed, and developed the concept of “Contact Points for people who gained professional qualifications abroad – AST” (Anlaufstellen für Personen mit im Ausland erworbenen Qualifikationen - AST).

The concept of an AST-network was presented in summer 2012. The Viennese *Perspektive – recognition counselling* was taken as a model, so that by the first of January, 2013 five AST-Contact Points had been integrated into well-established counselling partner-NGOs for migrants in Linz, Graz and Innsbruck.



Geographical chart of NGOs including their offer of AST

Since its establishment the AST-network also provides counselling in the neighbouring federal states and districts, and additional locations can be provided by request. Each NGO is responsible for several regional AST-Contact Points. CCfM in Vienna offers two Contact Points (AST-Vienna and AST-Lower Austria) and coordinates the AST-network (AST-coordination).

AST-network provides counselling services according to § 5 *Recognition and Assessment Act (AuBG)*. The Austria-wide AST-offering is supported by the Austrian Ministry of Labour, Social Affairs, Health and Consumer Protection. Additionally, AST-Vienna is supported by the Vienna Employment Promotion Fund (waff) and the Integration and Diversity Department of the City of Vienna (MA 17).



Organization chart of AST-network

Since being launched, CCfM in Vienna has expanded from a small association with two employees to an NGO with more than 50 staff members, offering counselling in over 20 languages. We cooperate with the Austrian Public Employment Service (PES) and many other public stakeholders and authorities.

The demographic conditions determining the counselling for migrants in Austria are as follows (2018): Austria has 16.2% foreign citizens and 23.3 % of the inhabitants of Austria have a so-called “migration background” (that is, at least one foreign-born parent). The fact which is determining counselling on recognition of existing non-Austrian qualifications the most is that so many migrants are overqualified for the work which they are doing: 23.5 % of foreign-born compared to 8.8% of the native-born population are working beneath the level of their qualifications. We assume that only approx. 20% of the qualified migrants benefit from our recognition counselling offer.

CIP AS PART OF CCfM

CIP is a specialized follow-up project of CCFM which targets guidance in cases of longer-lasting recognition processes. CIP is an offering for highly qualified but unemployed clients registered by the Austrian PES. The goal of CIP is to build on prior qualifications and skills, and to search for and finance tailor-made measures (bridging courses, internships, etc.) which will supplement the individual recognition process. All of the necessary steps for the individual are listed in the “educational plan” for each client, as well as for the PES advisors.

CIP specializes in particular in clients from non-EU backgrounds with regulated professions, such as those from the medical professions: doctors, dentists, nurses, pharmacists and physiotherapists; but it also targets many other groups such as teachers, lawyers, etc.

CIP has developed unique measures and measure-sets for clients, and arranges the coverage of costs for any additional expenses during the recognition process with PES Vienna and Lower Austria. CIP has provided support for nearly 5,000 academically / professionally qualified migrants and refugees since it was launched in 2012.

THE ROLE OF AST-COORDINATION

AST-coordination is the back-up for AST-counsellors. This support includes the organization of continuing education for the AST-network; quality management, and the elaboration of working- and position-papers and checklists.

AST-coordination maintains the homepage of the website for the network, and informs stakeholders and actors about news from the education sector. It is involved in PR, and issues statements and comments in reaction to the ongoing development of law and policies around recognition and migration law.

AST-coordination is involved in lobbying and networking with decision-makers to promote adequate employment of migrants, and works on the further development and adaptation of the regulations around qualifications recognition. Additionally, there are meetings and events for stakeholders organized by AST-coordination several times every year, maintaining contacts with authorities on a regional, national and international level.

THE DETAILS OF COUNSELLING FOR QUALIFICATIONS RECOGNITION

AST-counselling for qualifications recognition includes:

- preliminary information and professional advice about the legal basics of individual recognition: offered multilingually (German, Bosnian / Serbian / Croatian, Bulgarian, Turkish, English, Polish, Russian, Ukrainian, French, Spanish, Chinese, Farsi, Arabic), free of charge and case orientated, at every stage of the recognition process, with reference to regional possibilities.
- comparison of the foreign qualification with the professional requirements in Austria (referring profession in Austria).
- clarification of the necessity and potential for formal recognition (not every qualification can / must be formally recognized), leading to a decision as to whether assessment or recognition is needed.
- coverage of costs of certified translations of documents needed for recognition (approx. 40% of the clients are using the translation service).
- support with the application for recognition, assistance during recognition proceedings, and explanation of the decision given.
- cooperation with recognition authorities like Enic-Naric *et al.*, and other partners.
- clarification of the occupational fields, qualification profiles and regulations of the Austrian labour market.
- clarification of opportunities for continuing education and training, and of potential sources of funding and the eligibility criteria.
- assistance in the search for “bridging courses” and the financing of these (a set of measures in cooperation with Viennese CIP),
- identifying alternative paths if formal recognition is not possible.

Counselling regarding the recognition procedures is a specific form of professional advice, assisting clients to gain the formal and equal recognition of foreign qualifications as well to identify employment appropriate to their qualifications and, thereby, allowing them equal participation in the Austrian labour market. This kind of counselling is an interface between labour market counselling, education counselling and career guidance. The approach of AST-network is based on Austria-wide networking and cooperation between relevant recognition authorities, institutions and organizations at a regional and national level to promote recognition and utilize the existing resources.

The AST- and CIP-counselling is based on the following principles:

- open to the evaluation of all formal qualifications, and professional analysis of the individual's set of qualifications and competencies in the context of the Austrian labour market.
- recognition counselling is not obligatory.
- the duration of the counselling process has no prescribed limit.
- includes a filter function: preventing unpromising applications.
- core values of empowerment, equality of opportunity, cooperation, solution- and goal-orientation, transparency, assistance for decision making, up-to-dateness.
- no general education advising or vocational orientation is offered.
- clarity that counselling is not the recognition, but supports clients to seek recognition - recognition as a formal act is the responsibility of the authorities;
- due to the complexity of the recognition process, the counselling can't be offered by e-mail, and only in a limited way by telephone (however, in some Austrian regions, difficulties in attending for personal counselling occur).
- Recognition counselling can't solve other issues like compliance with migration law, but due to cooperation, there is access to other counselling for these matters for clients.

Our mission statement and a description of the counselling concepts underpinning AST-network and CIP are available.

TARGET GROUP OF AST – FACTS AND FIGURES

The target group of AST contains clients living in Austria with completed formal qualifications from abroad above the Austrian complementary level (8th grade) and who wish to utilize their competencies in the Austrian labour market. The labour market status of the client (employed or unemployed) is irrelevant to the counselling, as is nationality, origin or ethnic group. However, the clients must have approved access to the labour market (permission to work in Austria). Clients contact the appropriate AST depending on their place of residence in Austria. Because we offer multilingual counselling, clients can book an appointment for counselling in their mother tongue.

The following details describe the profile of the AST-target group (2018):

- 38.3 % of AST-clients are residents of Vienna.
- 54.1% of the clients have academic degrees; 33.5% have high school diplomas; 10.1% have completed a professional qualification / apprenticeship.
- 62% of AST-clients are women.
- 70% of AST-clients are below the age of 40.

- 61.2% of AST-clients are non-EU citizens. About 23% of the clients among non-EU citizens are state-approved refugees (entitled to asylum or holding subsidiary protection status).
- the ten major groups among AST-clients are citizens of Syria, Iran, Serbia, Hungary, Poland, Rumania, Iraq, Turkey, Russia and Slovakia.

The target group of CIP overlaps partly with the group of AST-clients. The profile of the CIP clients includes persons who are unemployed and registered by PES Vienna, which is in the case of refugees only possible if they have been granted the status of asylum protection or subsidiary protection (asylum seekers are neither allowed to work in Austria or to be registered as unemployed). Because the focus is on usability of the qualifications, the CIP target group is confined to persons already living in Austria for a maximum of seven years. The individuals also have to be interested in using their existing qualification (rather than to seek to re-train or engage in another occupation), and willing to build upon the recognition process and to undertake further relevant education or training.

RECOGNITION OF FOREIGN QUALIFICATIONS IN AUSTRIA

Currently, there are very different procedures, and no uniform system, for the recognition and validation of foreign qualifications in Austria. Formal recognition is formative for the AST-counselling - numerous regional and federal laws and regulations determine the counselling. There are more than 100 authorities responsible for recognition Austria-wide.

The validation of non-recognised foreign qualifications is being driven by the demands of the labour market and companies' requirements. Clients encounter difficulties in gaining professional experience in Austria. Professional recognition is often an agreement between the employer and the employee, except in the case of regulated professions where formal education and qualifications are needed to engage in the professional activity; e.g. nurses, medical doctors, dental practitioners, physiotherapists, teachers, etc.

The type and form of recognition depends on many variables, for example, the level of education gained abroad. In the case of a university degree, there will be the Ministry of Education or the university responsible for recognition. In the case of an apprenticeship, the Ministry of Economics will be the recognizing authority. If the qualification originates in the EU, the recognition will be determined under the relevant EU directives, but there are still multiple authorities responsible for the assessment. Qualifications gained in countries outside the EU need to be recognized through different boards. The purpose for which the recognition is sought defines the authority too: depending on whether the client is planning on further education or aiming directly at immediate employment, a different authority will be involved. The variable of whether the relevant profession is regulated or not specifies the form and the length of the recognition process as well. Based on the type of qualification and the client's professional plans, the assessment or recognition procedure can be started.

The complexity of recognition of foreign qualifications, based on the examples of an EU- and non-EU qualification for dentistry and dental assistant, is demonstrated in the following chart:

Qualification	Steps needed for recognition
Dentistry gained in EU-country	<ul style="list-style-type: none"> • Language courses in German and medical German. • Collecting of documents, translation and application by Ministry of Labour, Social Issues, Health and Consumer Protection. • Decision of authority – recognition based on the EU-directive. • Registration in Dentistry List of Dental Medical Council.
Dentistry gained in non-EU country	<ul style="list-style-type: none"> • Language courses in German and medical German. • Collecting of documents and translation, and application to Medical University. • Attending the nostrification assessment; comparison of foreign transcript of records with Austrian curriculum by the Medical University. • Decision of authority including complementary exams and diploma thesis. • Attending the complementary exams, writing of diploma thesis. • Exam in Medical German by Dentistry Medical Council. • Registration in Dentistry List of Dentistry Medical Council.
Dental assistant gained in EU-country	<ul style="list-style-type: none"> • Language courses in German and medical German. • Collection of documents and translation, and application to Ministry of Labour, Social Issues, Health and Consumer Protection. • Decision of authority with potential complementary measures. • Attending the complementary exams / training.
Dental assistant gained in non-EU country	<ul style="list-style-type: none"> • Language courses in German and medical German. • Collection of documents and translation, and application to local governmental Department of Social and Health Issues. • Decision of authority including complementary measures. • Attending the complementary exams / training.

The huge number of regulations and laws concerning formal recognition within Austria make the counselling and the recognition process itself challenging. Additionally, there are various other challenges, which need to be considered, such as:

- insufficient language skills to meet the need for those skills during recognition (for some recognition types German language skills have to be confirmed).
- missing or incomplete documents.
- lack of system-knowledge and inadequate practice; not enough experience; how to initiate professional performance. Some migrants spend years trapped in low skilled jobs for which they are overqualified. The reasons are very diverse: lack of support in job search, being a single wage earner or the unknown / complex processes for recognition of qualifications.
- different qualification profiles in the country of origin and in the country of residency.
- personal situation and family background.

INNOVATIVE ADDITIONAL SERVICES

AST-network, as an initial expert body in the matter of recognition counselling in Austria, now offers meetings for specific groups of clients. These meetings provide group counselling for certain occupational groups or owners of specific degrees (doctors, dentists, nurses, etc.). These events take place in all AST regional centres.

The meetings for occupational groups started in 2010 with “Nurses from former Yugoslavia”, offered in the mother tongue. Currently doctors, dentists, construction engineers, psychologists, pharmacists, teachers, kindergarten teachers, those from economic and commercial professions, those from the technical occupations, and a group for “utilizing the high school diploma” are meeting regularly, to share ideas, experiences and learning materials across members. The goal of these groups is to get know each other; avoid social exclusion, and become informed about recognition procedures or existing training / courses. At the same time, there is a need for contact with stakeholders or relevant recognition bodies and potential employers, and for preparation for job-seeking. Ex-clients whose qualifications are already recognized participate in these meetings to speak about their experiences and become role models.

Additionally, there are meetings and events concerning various fields of education in the context of recognition, e.g. international education systems and support systems for refugees and migrants in Austria. These events are organized by AST-coordination several times every year.

CONCLUSION: THE INVOLVEMENT OF AST AND CIP

AST-counselling is a well-known offering in Austria. We shape the issue of recognition of qualifications and make it visible. Recognition is an issue for civil society, and a political and economic matter.

The AST-network employs 29 staff members, who are experienced multi-professionals with self-explored expertise and accumulated knowledge. Cooperation at regional level within the AST-network is essential as there is no uniform system for recognition and validation of foreign qualifications in Austria. Since its founding in 2013 AST-network has counselled more than 50,000 beneficiaries Austria-wide. About 500 (5,000 since launched in 2012) among them were parallel clients of CIP in Vienna.

AST-counselling, connected with the offer of CIP, can cause the following effects for clients:

- formal recognition of the equality of foreign qualifications in reference to its Austrian equivalent.
- achieving an education level through complementary measures.
- qualification activities financed through public funding.
- supplementing professional abilities and language skills.
- occupational change and adequate job opportunities.
- networking, connection with additional counselling offers.

The external evaluation of AST shows that participation in AST-counselling speeds up the recognition and / or assessment of foreign qualifications; helps with requalification and further training / education; supports finding employment suited to migrants' qualifications and helps avoid underqualified employment. Since the AST-counselling was established many new training / education options have been developed.

Based on wide experience, AST-Contact Points provide structured pathways for getting learning outcomes validated / recognized, and a matrix of solutions for clients, depending on their personal and educational situations. In cases where the intended recognition process doesn't work, AST-counselling seeks to find alternative case-orientated solutions.

The daily practice of AST-counselling implies a need for the revision of some legislation, which we are lobbying for (e.g. labour law, collective agreements and recognition practice) to represent the interests of migrants. We are lobbying in favour of further regulation of recognition adaptations, especially the adjustment of degrees from third countries to EU standards.

Employing people who gained qualifications abroad is still beset with the issue of employers' doubt. This has to be overcome by awareness-raising on the subject of recognition of foreign qualifications and competences, so preventing "overqualified" employment. Awareness-raising among employers to the existence of available skills among migrants and refugees is an important part of our work. We are trying to encourage employers to rethink their current recruitment policies to identify and target foreign-diverse skills and knowledge.

The process of recognition of foreign qualifications is long, but it has a long-term positive effect once completed. Due to the information and counselling provided, and the resulting clarification of professional goals, the AST-Contact Points promote adequate employment of migrants. Having settled in Austria, migrants are supposed to be reached as soon as possible to provide information about the professional possibilities available. Furthermore, AST-counselling makes a contribution to sustainability: counselling resulting in a job appropriate to the client's qualification has a sustainable impact on the further career and the employability of the individual.

The employment of persons who are qualified abroad positively affects their long-term labour market integration. It impacts and helps to stabilize the Austrian labour market and economy permanently. The hidden potential of migrant's qualifications and their need to utilize this potential can in turn address the needs of the Austrian labour market regarding several under-supplied professions (IT, medical occupations etc.).

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EMPOWERMENT THROUGH RECOGNITION OF PRIOR LEARNING: LISBON CITY COUNCIL QUALIFICA CENTRE

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ABSTRACT

Lisbon City Council's Department of Development and Training created its Qualifica Centre in 2002 to promote the Lisbon City Council as a lifelong learning organization. The Centre constitutes a citywide effort to close the opportunity gap by transforming the way adults access and experience learning and the paths they can follow to turn life achievements into empowerment and success. It is open to refugees and people with a migrant background and it has served thousands of participants from both native and migrant communities. Its main activity is the recognition of prior learning process (RVCC), which is part of the Portuguese National Qualifications System. This article focus on exploring the methodological approach and its contribution to the empowerment of candidates, through the use of trigger questions, life history (Histoire de Vie), critical thinking workshop sessions and the Competences Portfolio.

Key words: Migrants, Recognition of Prior Learning, Qualification, Methodology, Competence, Portfolio, Empowerment, Refugees, Lisbon.

LISBON SOCIAL CHALLENGES

The Lisbon region faces major social and economic challenges, particularly regarding the education and training of young people and adults. According to the 2011 national population census, about 60% of the residents of the Lisbon region have not completed the compulsory education of 12 years of schooling (Instituto Nacional de Estatística, 2012).

LISBON QUALIFICA CENTRE

In 2002, Lisbon City Council's Department of Development and Training created the Qualifica Centre (Lisbon Qualifica Centre) which aims to promote the Lisbon City Council as a lifelong learning organisation, committed to the qualification and the empowerment of its workers and of all citizens living, studying or working in the city. The Centre is open to refugees and people with a migrant background and since 2002, the Qualifica Team has served thousands of participants, from both native and migrant communities, including hundreds whose country of origin is not Portugal.

The Centre is coordinated with the city's refugee network and has active partnerships with dozens of organisations such as *Conselho Europeu para os Refugiados*.

The Centre's 'Recognition, Validation and Certification of Competences' process (RVCC) is an ongoing city-wide endeavour effort to close the opportunity gap by transforming how adults access and experience learning and the paths they can follow to turn life achievements into empowerment and success.

NATIONAL QUALIFICATIONS SYSTEM

The RVCC process is part of a wider lifelong learning and Vocational Education and Training (VET) national ecosystem, the National Qualifications System (NQS) that includes the National Qualifications Framework (NQF) established by Decree-Law no. 396/2007 as a governing structure for its operation. The NQF was established in compliance with the implementation of the European Qualifications Framework (EQF) and aims to raise the qualification of adults through education and professional development.

THE RVCC PROCESS

Lisbon City Council's Qualifica Centre invests in the RVCC process as a means to foster consolidated, transformative change for adults who are locked out of traditional paths to success and to ensure that everyone can develop their full potential in life and work.

Despite the significant educational divide in the Lisbon region, evidence clearly suggests that learning also takes place outside school through non-formal and informal education, and that non-formal and informal education are as valuable as the formal learning taking place in school (Cavaco, 2007).

The RVCC process allows for the identification, recognition, validation and certification of previously acquired competences by adults, throughout life in formal, informal and non-formal contexts with the use of methodological tools such as the competences audit and the autobiographical approach - life history (*Histoire de Vie*).

It involves the use of a set of assessment tools and activities resulting in the candidate's Competences Portfolio (portfolio). The portfolio contains evidence and proof of the competences that the candidate possesses.

METHODOLOGICAL APPROACH

Through the implementation of Paulo Freire's 'Problematising Pedagogy' and Marie Christine Josso's 'Histoire de Vie', in which learning becomes a critical understanding of the world (Freire, 2014), the team set the methodological principle of challenging the participants to explore several dimensions of their life. Through critical thinking and confidence-building collaboration, candidates' personal interests, supportive relationships and diverse learning opportunities are leveraged, embraced and self-recognised as important and empowering. The adoption of Marie-Christine Josso's 'Histoire de Vie' as a methodological approach towards the acknowledgement of the importance of life choices and experiences (Josso, 2002) is a paramount principle adopted in the RVCC process and evidenced in the candidates' portfolio, where achievements are shared and skills are showcased (Pires, 2005).

Trigger questions

Inspired by Freire's and Josso's work, the Centre's RVCC Process is based on 15 trigger questions deployed through multiple-sessions workshops by a cohesive and diverse team of professionals. Questions put the focus on the candidates and aim to instigate the identification and characterisation of their competences by involving the candidates in the analysis and reflection of their own life history, allowing them to take charge of their own skills and knowledge, but most importantly, their strengths and empowering opportunities.

The trigger questions are:

1. What are my expectations?
2. What do I get out of the RVCC Process?
3. What does it mean to recognise and validate my competences?
4. What are competences?
5. How does one learn?
6. Why is my life experience important?
7. How do I identify the competences/skills that I have acquired in my life?
8. How can I document my skills in a portfolio?
9. What is the Key Competences Charter?
10. How can I relate this Charter to my life?
11. What are my plans after finishing the RVCC Process?
12. Where should I focus my attention, where should I invest my energy?
13. What are the steps towards my goal?
14. Am I ready to validate and certificate my competences?
15. Are my Portfolio and my Life History concluded?

The trigger questions are drawn upon the following key principles:

- i) *Interdependent* - all questions overlap and are reinforced by each other. Although sessions are planned beforehand, all trigger questions are interchangeable and may be omitted.
- ii) *Nuclear* - questions are core to the validation process and oriented towards showcasing certification and achievement.
- iii) *Flexible* - questions are not binding nor are they forced. Participants are free to explore or skip trigger questions according to their own interests and sensibility.
- iv) *Customisable* – questions are open and thought provoking; they can be addresses partially or separately. Questions can be modified and must be adapted to participants' goals, expectations and workflow, allowing for individual pathways to validation.
- v) *Empowering* - questions are purposefully set in a progressive manner in order to help participants solidify their own tools to uncover and evidence their skills. Trigger questions ask participants to look into themselves from new and different perspectives, supporting their own (re)signification.

With guidance from Lisbon Qualifica Centre's team, trigger questions help the candidates to uncover their own skills and competences, by documenting their life, identifying strengths and areas for improvement and ultimately changing their outlook and aspirations.

The following principles guide the methodology:

- i) *Nobody wants to learn (again) what they already know.*
Identifying and mapping learners' expectations and interests is paramount to creating engaging and customised learning experiences. Sessions are constantly redesigned in order to adapt to the selected goals. All activities deployed in the RVCC process must facilitate and promote collaboration and allow self-assessment.
- ii) *Learning happens everywhere. Not only in the classroom.*
Following Paulo Freire's work, critical thinking and collaboration are encouraged as means to fully exercise citizenship (Freire, 2014).
- iii) *In the digital age, learning is connected, social and lifelong.*
The connected learning paradigm combines personal interests, supportive relationships and opportunities. It is a type of learning that takes advantage of abundant access to information and social connection rather than isolating it, and embraces the diverse backgrounds and interests of candidates. Furthermore, all planned activities are interest-based and a collaborative friendly environment is maintained during RVCC group sessions.

iv) *The learner is the focus and the centre of the learning process.*

Non-formal education theory drives the instructional design of every session, ensuring that all learners have an opportunity to succeed. RVCC sessions are always focused on participants' interests, expectations and needs.

Following the Centre's decades of experience in the field of RPL and the empowerment oriented methodology it uses, an intention was declared to contribute to the advancement of RPL and to benefit from the knowledge that academia provides. University researchers and students became regular collaborators, broadening the possibility to share experiences, to promote study circles and support the team's opportunity to continuously question the methodology and update it through thought-provoking inputs.

Candidates have also contributed by granting researchers access to their portfolio for the purpose of scientific and academic research and by directly collaborating with investigators.

In 2014, part of the team attended an advanced training programme for a semester at the University, including classes in Non-Formal Education and were taught by leading researcher Carmen Cavaco. The training was particularly effective towards deschooling our RVCC approach. Finally, the Centre team is involved in the City Council's Human Rights Education Programme and Training of Trainers Programme, providing it with an updated Non-formal Education toolbox and networking opportunities with local lifelong learning organisations.

RVCC GROUP SESSIONS AND INDIVIDUAL WORK

The RVCC process is currently comprised of 90 hours of group workshop sessions and as many hours as necessary of individual guidance.

Building a safe learning environment is essential to allow candidates to share experiences others can relate to. Sharing experiences is a gradual but vital aspect of the RVCC workshop sessions and the understanding of each participant's context is essential for a purposeful self-identification of learning achievements and competences. Group discussions and group work provokes opportunity, autonomy and accountability which are fundamental for the individual work the portfolio requires and are followed by mandatory individual work. Writing, documenting and building the portfolio, although guided, constitutes a profoundly solitary task, filled with individual choices as well as empowering opportunities.

The portfolio documents the candidate's lifelong acquired competencies, including evidence of skills and the RVCC activities. Submission of the candidate's final portfolio enables access to the Certification stage of the RVCC process.

VALIDATION AND CERTIFICATION

Full academic accreditation of basic education (4, 6 or 9 years of schooling) or upper-secondary education (12 years of schooling) is issued upon successful assessment of the candidate's Portfolio by an appointed Jury within the scope of the Basic Level or Upper Secondary Key Competence Frameworks that are part of the National Qualifications Catalogue.

In the case of a partial certification, a Personal Qualification Plan is issued with information on education and training opportunities and suggestions of pathways for the acquisition of the competences still required.

MIGRATION AND EMPOWERMENT

The most significant aspect for migrant candidates is the assignment of an advisor who accompanies the candidate throughout the entire RVCC process. The advisor (Técnico ORVC) acts as a mediator between the candidate and the RVCC process team.

Another important aspect is the methodological focus on empowerment. Trigger questions, life history (Histoire de Vie), critical thinking workshop sessions and the Competences Portfolio, are all oriented towards mapping cultural heritage and lifelong experiences which, in turn, helps to more effectively value one's identity.

The RVCC Process is also a channel for the emergence of new competences and skills, such as digital literacy, maths and literature, as well as the capacity of speaking out and the exercise of full citizenship, as the RVCC Process is highly participatory.

Creativity is boosted and the capacity for decision making is improved, as candidates are constantly asked to make choices, organise information, write, commit to a script and build up a narrative.

The Centre's methodology has been honed to ensure as much impact as possible for both migrant and native candidates:

Firstly, advice, guidance and co-planning of each participant's concrete next steps in terms of training, academic goals, personal goals and work goals are integral and mandatory in Lisbon Qualifica Centre's methodology. The empowerment that is achieved during the RVCC process is thus maximised and potentially transformed into impactful changes for the candidates.

Secondly, the Centre is part of a larger learning ecosystem. It is integrated into Lisbon's Lifelong learning Programme and it is part of the City Council's Department for training and development, ensuring candidate's access to several lifelong learning initiatives, including digital inclusion courses, literacy courses and alphabetisation for both, native and migrant communities. Most candidates take part, after or during the RVCC process, in training courses, VET or other lifelong learning initiatives promoted by the Lisbon City Council, partners or other organisations. Moreover, candidates are often informed depicted and/or invited to awareness initiatives ensuring continuous follow-up to interested candidates.

FINAL THOUGHTS

Lifelong Learning is paramount to bridge all the divides in Lisbon and to foster equality and success. It has been the goal, since the foundation of the Training and Development Department - more than thirty years ago - to develop skills, foster partnerships and accelerate adults' qualification, allowing workers and citizens to find new paths for professional and personal fulfilment.

Our results, our care for the methodological approach attest to our vision. To transform Lisbon into a city of learning by leveraging knowledge, developing skills, addressing the educational divide, the digital divide and the citizenship divide, and creating opportunities for the success of all its citizens.

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PROMOTING LIFELONG LEARNING FOR MIGRANTS AND REFUGEES: CERTIFICATION AND ACCREDITATION OF SKILLS ACQUIRED IN FORMAL AND INFORMAL CONTEXTS

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THE MISSION OF CAP (CENTRE FOR LIFE LONG LEARNING FOR MIGRANTS AND REFUGEES) AT THE UNIVERSITY OF BARI (ITALY)

CAP¹ was established in 2015 at the University of Bari as an experimental output of two research projects funded by the European Fund for the Integration of non-EU migrants (EIF). Since 2016 it has been supporting young and adult refugees and migrants in managing their vocational and professional careers through a process of formal validation and certification of their skills and prior learning, acquired in formal and informal contexts (Berger-Schmitt, 2000). These forms of informal and non-formal learning frequently take place without full awareness or intentionality on the part of the protagonist, who thus finds it hard to acknowledge them and attribute them to him / herself. The vocation of CAP, as a university service for the valorization of lifelong learning among adults, is expressed in the service offered to the users of self- and hetero-assessment of soft skills against a profile of skills useful for new employment and ongoing training paths. This relies on the interdisciplinary work carried out by researchers in the areas of sociology, the psychology of work and didactics / formative assessment.

The University of Bari, through CAP, is a member of the Italian University Network for Lifelong Learning (RUIAP), which over recent years has been dealing with the problems of formal recognition, validation and certification of foreign qualifications, such as the time required, the costs and the complexity of the bureaucratic procedures.

It currently seeks to apply the combined guidelines of articles 22 and 25 of the Geneva Convention, of art. 2 of Law 148/2002, of art. 39 of the TUIM (Testo Unico Immigrazione) paragraph 5, the procedure laid out in the Testo Unico on immigration (legislative decree No. 286/98, directive 2011/95/EU – legislative decree 16/2014 - recognition of qualifications in lieu of original documents, the procedure foreseen for law No. 148/2002 following the Lisbon Convention).

It provides services to migrants and refugees such as information and guidance; assessment of soft skills; conversion of informally acquired on-the-job learning into academic credits; accreditation of previous studies and professional qualifications (also in instances where the original documentation is unavailable) according to the regional and national framework. The process of accreditation and certification consists of 5 steps: profiling, evidence gathering, evidence assessment, evaluation and accreditation, and conclusion (Scardigno, Manuti & Pastore, 2019).

The attention given by the Centre for Life Long Learning for Migrants and Refugees (CAP) to the valorization of learning acquired in all kinds of contexts arises from the reflection on the radical changes that the labour market has been subjected to, effectively imposing a rethinking of the framework of professional competence. The fluid and uncertain edges of post-modern careers call for not only technical skills but also soft skills, such as independence, flexibility, a spirit of adaptability and re-orientation (Bauman, 2007).

¹ www.uniba.it/centri/cap

The skilled worker is not merely one who possesses qualifications and experience, but who is able to demonstrate his / her skills and knowledge in the field in relation to context-specific demands. In order to understand the cognitive aspects of the learning process, it is useful to make a distinction between three terms: knowledge, skill and competence. One may know information, a fact, a theory or a procedure. The associated skill lies in the capacity to apply such knowledge in order to carry out tasks and solve problems. Having competence means having the capacity to use knowledge, skills and information in real life and work situations.

This dimension of expertise is closely linked to informal learning, i.e. all those forms of learning that take place tacitly and through informal channels, starting with the family itself. This reflection, supported by evidence gathered in work contexts and by the results of scientific research on a national and international level (Colley, Hodkinson & Malcolm, 2002; Jacob & Parks, 2009; Kyndt, Dochy, & Nijs, 2009; Manuti *et al.*, 2015), is broadly confirmed in the attention which over recent years the European Union has dedicated to the role played by the informal and non-formal contexts of life in the development of competences.

Individuals learn and acquire skills not only in the traditional scholastic and / or university context (formal learning), but also and ever more often in alternative contexts: through participation in the organizations of civil society or in the virtual field of Internet and mobile devices, either individually or among peers.

CERTIFICATION AND ACCREDITATION OF SKILLS ACQUIRED IN FORMAL AND INFORMAL CONTEXTS

The connection between social research and the contextual policies of cultural and academic integration was obtained through an operative protocol adopted between CAP and the Regional Council of Apulia, and later extended to include the Universities of Foggia, Salento and the Polytechnic of Bari in June 2018.

The protocol concerns the construction and implementation of the Regional System of Validation and Certification of Skills of the Apulia Regional Council (SRVCC), which embraces the experimentation set up by CAP for the certification of the skills / qualifications acquired in non-formal and informal contexts over the course of the individual's life, which must be valorized, clarified and recognizable, with particular reference to the target group for CAP: political refugees or beneficiaries of international protection.

CAP researchers and the Professional Training Section of the Apulia Regional Council collaborated on the definition of an experimental working methodology for the provision of the service for the identification and validation of skills, and the University of Bari CAP was acknowledged as the regional 'certifying authority' for the identification and validation of skills.

The experimentation began with the request, sent to CAP, to examine the experiential and training background of two users of Afghan origins, who had been in Italy for a few years, and had been involved on a daily basis in intercultural mediation at reception centres, public structures and bodies. The two users aspired to carry out their professional activity with a formal recognition of the title / qualification of 'intercultural mediation expert'. In specific terms, the folder of transversal skills enhanced the profile of the two users, in line with the skills required by the professional body in question, as highlighted in the judgement given by the operators and provided together with the clarification document.

The service centre of the university accepted this innovative (the first case in Italy with refugees) request, making the commitment to lay down the basis of an ever more structured service, which would be accessible also to those who might need it in the future.

The activity started with the drafting of the application and the compilation of the 'Consent to the itinerary for the identification and validation of skills' sheet.

Those responsible for the acceptance and validation at CAP therefore undertook the process for the recognition and clarification of formal qualifications as well as non-formal and informal experience, in view of their potential certification by the Apulia Regional Council. The starting point, from within the Regional Repertory of Professional Bodies, was to identify the profile for which certification had been requested. The description sheet of the skill units and the relative knowledge and skills was compared with the evidence presented by the users to verify any similarities. The figure identified as the target of their certification for both users appeared to be made up of three areas of competence: the acceptance of foreign citizens, the facilitation of the exchange between foreign citizens and their territory of reference, and the development of social integration activities.

Starting from there, individual interviews were carried out in which the CAP researchers asked the users to provide as detailed a description as possible of their formative and professional experiences relevant to the field of reference. This information, documented by proof (letters of reference, work contracts, certificates of participation, diplomas, etc.), was included in the clarification document or portfolio, which highlights the experiences and the activities carried out, translating them into meaningful and documentable learning processes.

In particular, by making reference to the experimentation carried out with the two users, respectively citizens with subsidiary protection and international protection, the analysis of the curriculum and its translation in the clarification document highlighted major overlapping between the skills, knowledge and abilities outlined in the sheet of the Regional Repertory and the studies documented by various sources of proof, numbered so as to make them available in the confirmation process as foreseen by the certification itinerary.

CAP then contributed to enhancing the portfolio of the two users, inserting among the documented studies and those in progress an evaluation of their so-called soft skills, i.e. interpersonal skills useful for carrying out the role of intercultural mediation expert alongside their other technical skills.

The phase following the drafting of the clarification document consisted in the validation of skills, which in concrete terms entailed the analysis of the evidence produced to support the studies enumerated. Once the reconstruction phase was completed, the itinerary outlined the possibilities for completing the itinerary – in relation to the percentage of coverage of the skills expected by the users – with the definition of a plan of action regarding the potential completion of their study careers, and / or the integration of relevant professional experiences.

In the case of the two users, given that the percentage of coverage of the three areas of competence investigated was over 70%, it was possible to continue along the path of formal certification. The validated skills were formalized in the Certificate of Validation, and this stage came to an end with the identification of the contents to investigate in the direct assessment followed by the official request for the constitution of a third-party evaluation panel, made up of experts in the subject area in question, as well as experts in validation and certification from CAP, representatives of the social sectors, of the Ministry of Labour and the Sector of Professional Training of the Apulian Regional Council.

The assessment consisted in a technical / practical test of the skills not covered by the users' curricula. The itinerary was finalised successfully, with the awarding of the certificate of professional qualification as 'intercultural mediation experts' for both users, the first two beneficiaries of international protection in Italy to receive a professional qualification recognized by the Regional System of Education and Training. The agreement was based on the common institutional interest in guaranteeing to every individual the valorization of the

skills acquired in all learning contexts, coupled with the possibility of putting such skills to use in the various fields of lifelong learning (education / training / work).

On the basis of the protocol, access to services for the identification and validation skills acquired in non-formal / informal learning contexts will be possible in dedicated service centres, lifelong learning centres and / or university structures with placement services (career guidance) offering the recognition and acknowledgement of skills in the universities of Apulia.

The Apulian universities and the Puglia Regional Council will be called upon to guarantee the matching of training and university courses for the recognition of university training credits (CFUs) and, should the responsibility remain on a regional administrative level, develop the methodology of issue of the certification of skills / qualifications; analysis of the access requirements to the roles of the SVCC-RP; staff training; the definition of a regional repertory of soft skills; the formulation of a methodology of credit recognition covering training paths and university careers for the purposes of student placement; all with particular reference to our target group of international students and refugees.

OUTCOMES OF ACADEMIC INCLUSION OF REFUGEES IN THE UNIVERSITY OF BARI ALDO MORO CAP

Over these years, thanks to the efforts of CAP, 17 refugees have won a grant financed by the Conference of Italian Deans, by the Ministry of Inner Affairs and by the Regional Agency for the Right to Study to start and / or continue their university study, and two refugees have gained a formal recognition of their professional experience and the consequent certification by the Apulia Region. This experience is a clear example of how it is possible to achieve such an ambitious goal in southern Italy, where we are very near the Mediterranean area where many migrants first land.

Over the years, CAP has developed an innovative approach to prior learning recognition based on identification, validation and certification of experience and learning. During identification CAP examines the professional and educational resumé of the candidate and, where necessary, supports him or her in the writing and editing of the Europass curriculum. Later it carries out an assessment of the evidence provided, according to three criteria (value, pertinence, validity). At the end of the second phase, CAP communicates the final decision to the candidate and issues the validation documents. The third and last phase provides for a final assessment before a board composed of experts, representatives of the Regional Council, members of CAP, and the representatives of trade unions, trade associations and social partners, according to Italian law (art. 29 L. R. n. 15/2002).

The strategic element often undervalued by the hosting community, called upon to work towards integration, is the desire for autonomy among migrants and their wish to move away from a welfare-based dimension in order to affirm their own capabilities and skills.

This aspiration is very often frustrated by the objective difficulties that they encounter, but even more by the subordinate level to which not only their contribution is relegated – often downgraded compared to their actual professional potential – but also their social position.

The step forward that the hosting societies are called upon to make, as expressed also by the UNHCR, consists of placing the refugees in a condition to be able to state their own needs and to take part actively in decisions concerning their own lives. When they are in a position to be able to take part in the definition of strategies and policies, it will at last be possible to speak of the real empowerment of the refugees themselves.

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PART 3

eucen 2019 Autumn Seminar | Barcelona, 14-15 November 2019
“Learning for Entrepreneurship: A Global Citizen Perspective”

THE MAGNET PROJECT: LIFELONG LEARNING AND MIGRANT ENTREPRENEURSHIP SUPPORT

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INTRODUCTION

Motivated by recent reports indicating migrant entrepreneurship¹ as a driver for growth and integration, the partners of the MAGNET consortium have explored the applications of lifelong learning schemes that may help reduce the socio-economic marginalisation of self-employed migrants across Europe. In fact, the lack of language skills, intra- and inter-ethnic social capital, and work experience in the host country contributes to their exclusion from the labour market as much as the lengthy bureaucratic procedures for residency entitlements and the major limitations to accessing finances (Faustmann, Filipova-Rivers & Skrivanek. 2018).

Given the absence of EU regulation specific to migrant entrepreneurship, public institutions, whether at the national or European level, are often incapable of providing adequate support to self-employed migrants. Besides, so far, most academic research on migrant entrepreneurship has barely focussed on the role of private support organisations and their increasing socio-economic impact on migrant communities. Conversely, the work of the MAGNET consortium starts from the assumption that fostering the exchange of information, knowledge, experience, and instruments of migrant entrepreneurship support between educational institutions and organisations operating in the field has become fundamental (Filipova-Rivers, Marree & Hanna Wieten 2019).

This paper presents exploratory research centred on the case study analysis of the MAGNET project², which aims to provide a provisional answer to the question that prompted its creation: how can migrant entrepreneurship benefit from lifelong learning strategies?

The background section includes an overview of the lifelong learning strategies implemented at the EU level and a short account of the recent impact of migrant entrepreneurship on the European markets, both of which are primarily based on secondary sources. The three main case study sections present the MAGNET project's outputs: 1) the Network for Practitioners; 2) the Migrant Entrepreneurship Academy – MEA; and 3) the Open Toolkit. Their examination consists of a comprehensive qualitative analysis of the three thematic network forum reports, the focus group discussions, and the additional documents provided by the consortium.

BACKGROUND AND EXPLORATORY WORK

EU Lifelong Learning Strategies

Motivated by progress towards the European Single Market and by the risks as well as opportunities presented by globalisation and new information technologies, there has been an increasing interest in lifelong learning within the EU since the early 1990s (Dehemel, 2006). Under Jacques Delors, the European Commission sought to reach an understanding amongst the member states with regards to a new development model for the EU by

¹ This paper adopts the definition of migrant entrepreneur provided by the MAGNET consortium: a person with migrant background in effective control of a social venture or commercial undertaking for more than one client.

² Because the project is currently entering the final phase, the analysis is based on its partial results.

championing lifelong learning as the catalyst of a changing society. However, following the widespread agreement on the Strategy for Lifelong Learning an emblematic discursive shift away from social integration led to the adoption of a neo-liberal approach to LLL, putting the emphasis on individual responsibility and human capital (Volles 2014).

Therefore, up until the 2008 economic crisis, lifelong learning policies and programmes were modelled after the Lisbon Strategy, which aimed to turn the EU into the most competitive and dynamic knowledge-based economy in the world by 2010. In this context, the Commission's agenda and political discourse centred on LLL's contributions to individual employability and, indirectly, to sustainable growth, competitiveness, and innovation. Besides, the non-economic objectives of lifelong learning – e.g. personal fulfilment, social inclusion, active citizenship – were increasingly sidelined by the promotion of entrepreneurial know-how (Arvanitis & Mikelatou, 2017).

Ultimately, throughout the last decade, LLL has often proven a flexible policy tool for the continuous development of the workforce's skills through vocational schemes fostering entrepreneurship, labour mobility, and adaptability. Nonetheless, particularly since the recent upsurge of migration flows and political radicalisation across Europe, policymakers have progressively pushed for a paradigm shift in the EU's lifelong learning strategy (Council and the Commission, 2015). For these critics LLL may, in fact, become more effective in reducing marginalisation when articulated into policies and programmes whose neoliberal features are matched with an inclusive perspective fostering civic and political awareness as much as intercultural competencies (Boyadjieva & Ilieva-Trichkova, 2018).

Migrant Entrepreneurship across Europe

Despite facilitating intra-EU mobility, the establishment of the Schengen Area brought along strict border controls and visa regulations limiting immigration by third-country nationals (Castles, De Haas & Miller, 2014). While envisioning the unification of the EU market, its member states have, in fact, triggered the increase of irregular humanitarian, family, and labour migration from non-European countries by progressively imposing restrictive policies (Czaika & Hobolth, 2016). This pattern has become even more evident in recent years, whereby the arrival of more than a million asylum-seekers in 2015 has proven a major policy concern within the EU. Notably, these refugees and migrants have faced considerable obstacles while attempting to integrate into new communities and their labour markets: institutional racism, widespread discrimination, the ethnic segmentation of the job market, low qualifications, and de-qualification.

In later years, establishing business and social enterprises has become the key strategy adopted by third-country nationals to overcome barriers within certain labour sectors. Reports suggest that migrant entrepreneurship has not only proven one of the driving forces for the growth and diversification of national and regional economies, but also contributed to reduce social tensions and financial inequalities across Europe (Baycan-Levent & Nijkamp, 2009). Nonetheless, self-employed migrants still face heterogeneous challenges: lower income levels than employed migrants, high sectoral unemployment rates, and widespread informalisation of labour.

Indeed, migrant entrepreneurs tend to lack economic resources, political rights and social capital, as much as entrepreneurial, legal, and linguistic skills. However, they are further penalised by ineffective training and integration programmes which often can neither provide the facilities, logistics and security, nor do they involve local stakeholders who may help them to set up their activities (Faustmann, Filipova-Rivers & Skrivanek 2018). Public institutions, whether at the national or European level, are often incapable of offering adequate support to self-employed migrants. The absence of EU regulation specific to migrant entrepreneurship is as much an obstacle as the governmental focus on the promotion of technical and

managerial competencies through lifelong learning schemes. In fact, the primary objective of most training and integration programmes administered by public bodies and aimed at newcomers remains the enhancement of their individual employability and human capital (Garcés-Mascreñas & Penninx 2016). Migrant entrepreneurship support organisations do provide vocational courses and mentoring activities meant to develop migrants' skills and expertise, which would help them establish their own social and commercial enterprises. However, it is increasingly the case that their educational and support programmes include psycho-social, cultural, and political components deemed necessary for the integration and economic empowerment of vulnerable groups (Filipova-Rivers, Marree & Wieten, 2019).

LIFELONG LEARNING AND THE MAGNET PROJECT

It has been argued that the social and cultural capital of self-employed migrants may contribute to socio-economic integration and entrepreneurial success as much as their economic capital (Faustmann, Filipova-Rivers & Skrivanek, 2018; Piracha, Tani & Vaira-Lucero, 2014). Migrant entrepreneurship support organisations, therefore, ought to advocate for the creation, further development and broad dissemination of support schemes that would empower migrants with cultural, social, and economic resources. The MAGNET consortium's efforts to realise this very objective have resulted in the implementation of an integrated lifelong learning project, which has produced three main outputs:

- 1) The Network for Practitioners promotes the continuing professional development of transnational, national, and regional communities of organizations and institutions interested in migrant entrepreneurship support.
- 2) The Migrant Entrepreneurship Academy is a university-level programme for continuing education aiming to bridge the gap between entrepreneurship education and practical support programmes.
- 3) The Open Toolkit is a collection of tested, hands-on learning tools and training methodologies identified as good practice for practitioners in the migrant entrepreneurship domain.

Network for Practitioners

The MAGNET consortium itself can be considered the nucleus of the Network for Practitioners from which the regional, national, and transnational communities of practice have originated. Each partner established one such community by involving regional and national stakeholders as well as other partners of COSME consortia in order to encourage the exchange of information, knowledge, experience, and instruments of migrant entrepreneurship support³ (MAGNET Consortium, forthcoming).

This, in turn, allowed for a wide-ranging participation in the transnational thematic network forums held in Krems (Faustmann, Filipova-Rivers & Skrivanek, 2018), Amsterdam (Filipova-Rivers, Marree & Wieten, 2019), and Barcelona (Bankowska, Filipova-Rivers & Lalia, 2019).

Overall, the local NGOs and public institutions partaking in the network meetings drew attention to five areas where educational and training programmes for migrant entrepreneurship support organisations could effectively improve their coordination and mentoring schemes:

³ Austria, Belgium, Bulgaria, Germany, Greece, Poland, Spain, The Netherlands, United Kingdom.

Social capital and networking

- Promote the exchange of inter / transcultural competencies with local stakeholders – e.g. academic, business, public institutions – by involving them in migrant entrepreneurship support programmes;
- Focus on the local level of integration by addressing common barriers to social inclusion, fostering a structural welcome culture, and supporting the expansion of migrants' political rights.

Entrepreneurial Competencies

- Adopt a flexible and user-centred approach to encouraging migrant entrepreneurs to develop their own skills, become role models, and help build social and professional networks;
- Mentoring can include formal and informal social learning methods tailored to the needs of the individual more than academic and requalification programmes.

Continuous and Targeted Support

- Distinguish between different target groups depending on their migration status, country of origin, financial resources, gender, and other factors that would require specific support;
- Psycho-social support and joint reflections on the social and political barriers faced throughout their lives can deeply empower all migrants.
- Continuous techno-managerial support following the establishment of an enterprise is often necessary.

Coordination and Centralisation of Information

- Foster the coordination of grassroots and social enterprise-led support to improve the exchange of legal and commercial information valuable to migrant entrepreneurs;
- Lobby the EU institutions and national governments to establish a coordinated scheme for the requalification and formal recognition of newcomers' skills.

Access to Finance

- Promote the experience sharing and peer-exchange between local microfinance institutions, credit unions and support organisations for migrants;
- Jointly advocate for the creation of institutional systems for the provision of financial products to migrants at both the national and European level.

Ultimately, the Network acknowledges the necessity of implementing profound and urgent Europe-wide modifications to integration schemes and training programmes relevant for newcomers, people with migrant backgrounds, and the support organisations themselves.

Migrant Entrepreneurship Academy

The Magnet Entrepreneurship Academy responds to the MAGNET project's commitment to disseminate knowledge on migrant entrepreneurship support across Europe by involving HE institutions and organisations operating in the field.

MEA brings academics and practitioners together in a train-the-trainer scheme, which combines scientific research and best practice methods to bridge the gap between

entrepreneurship education and practical support programmes (MAGNET Consortium 2018). Its target group consists of key change agents (Faustman & Seiler 2018):

Direct beneficiaries

- Organisations active in the fields of migrant integration and entrepreneurship support;
- Future migrant entrepreneurship support organisations;
- Staff members, trainers, consultants, educators, lecturers;
- Various public stakeholders.

Indirect beneficiaries

- (Potential / future) migrant entrepreneurs;
- Migrant communities at large.

Participants in the MEA can learn from each other and get mutual guidance and advice especially during the peer-learning university course 'Migrant Entrepreneurship Support CP' accredited by the Danube University in Krems. It is offered over two semesters (15 ECTS) and consists of three face-to-face modules – three days each – in Krems, Berlin and Warsaw, complemented with e-learning activities. Its delivery is entrusted to lecturers and trainers with years of experience in the field of migrant entrepreneurship support, intercultural and business training, and migration and integration management.

Other than the final written practical project report, the participants must complete six learning modules (MAGNET Consortium, 2019):

- 1) Introduction to migration in Europe;
- 2) Migrant-specific aspects of entrepreneurship support;
- 3) Business support;
- 4) Business infrastructure;
- 5) Entrepreneurial competence evaluation;
- 6) Reflection peer groups.

Overall, the MEA intends to prepare its students for several tasks, such as:

- Supporting migrant people in the development of entrepreneurial competencies, financial strategies, and business plans;
- Identifying the needs and characteristics of their target groups in order to structure adequate support measures (e.g. learning activities, networking, political lobbying, etc.);
- Establishing mentor-mentee relationships based on continuous psycho-social and techno-managerial support.

The content of the course currently provided by the Migrant Entrepreneurship Academy⁴ largely represents the formalisation of some of the good practice developed by the participants in the regional, national, and transnational networks of practitioners. In fact, its interdisciplinary focus is reflected in the integration of the social, political, and business dimensions of migrant entrepreneurship support into a coherent training scheme.

Open Toolkit

The first version of the Open Toolkit is the result of a mutual learning process guided by the MAGNET consortium's methodology for good practice in migrant entrepreneurship support. The tools produced are practical training resources that can be implemented in and adapted to a local setting beyond the context of a single organisation. The MAGNET partners select and define good practices through cross-tool comparison in peer-to-peer review groups after

⁴ Its pilot phase began in September 2019.

scanning for tools from any specialist organisation operating in the field. A clear taxonomy helps the consortium members to structure and present each tool by specifying its intended outcomes, target audience, and content material. The respective 'how to guide' describes the functions of the tool, while additional case studies further illustrate its contextual application and potential impact (MAGNET Consortium, 2018a).

Presently, the Open Toolkit contains a set of ten tools collated by the members of the consortium. MAGNET plans to aggregate an additional set of fifteen tools⁵ sourced both from its partners and from other consortia funded by the COSME programme. Overall, the Open Toolkit focuses on four key aspects of migrant entrepreneurship support (MAGNET Consortium, 2019a):

- The pre-incubation phase of the business or social enterprise;
- Legal literacy and consultation;
- Financial literacy and consultation;
- Mentor training.

Unlike the other outputs, the current version of the Open Toolkit allows the practitioners to improve primarily their technical and managerial know-how. Nonetheless, the increasing emphasis placed by the communities of practice on the social and political components of migrant entrepreneurship support may orient the development of the new tools.

CONCLUSIONS

The MAGNET project redefines the scope of migrant entrepreneurship support by implementing an integrated lifelong learning scheme, which involves local NGOs and migrant communities as well as public and educational institutions. Overall, the case study analysis suggests that both the consortium and external stakeholders deem social capital development, political networking and entrepreneurial know-how as key dimensions of migrant entrepreneurship support. Besides, the mentoring and training activities for self-employed migrants prove more effective when incorporating continuous psycho-social and business support.

Despite the limitations posed by the project's partial results, the examination of its impact on the domain of migrant entrepreneurship support vis-à-vis the ongoing paradigm shift in the lifelong learning policy field leads to the elaboration of the following working hypothesis:

Lifelong learning strategies can improve migrant entrepreneurship, and thus reduce marginalisation, by promoting comprehensive integration programmes and support schemes, whose educational focus on social inclusion and critical citizenship is interdependent with, but not subordinate to, the enhancement of entrepreneurial competencies.

This conceptual framework disallows human capital theory as the fundamental tenet behind the lifelong learning policies and programmes implemented across the EU for the better part of the last two decades. Nonetheless, it indicates an additional path for contributing to current research on Lifelong Learning strategies modelled after more holistic approaches (Boyadjieva & Ilieva-Trichkova, 2018).

⁵ The new version of the Open Toolkit is expected to be published in March 2020.

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CALOHEE FRAMEWORK PROPOSAL FOR CIVIC, SOCIAL AND CULTURAL ENGAGEMENT

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INTRODUCTION

The current article was adapted from the CALOHEE Working Paper of the Tuning Academy, to which the author has contributed. The original document is available at www.calohee.eu.

There are a number of policy documents that suggest a broad range of items that can be included in Higher Education (HE) in order to incorporate and give substance to the issue of 'civic, social and cultural engagement' within HE programmes. To make these items applicable in the context of the project CALOHEE (Comparing Achievements of Learning Outcomes in Higher Education in Europe) these were compiled and analysed. Taking current developments as described in this paper as a basis, four dimensions have been identified, which together should make up the CALOHEE project framework of general descriptors for 'civic, social and cultural engagement'. These four descriptors are perceived as the minimum to be covered in HE programmes. As in the case of the domain / subject area frameworks each dimension includes a knowledge descriptor, a skills descriptor and a (wider) competence descriptor. This general framework can also be turned into an Assessment Framework by breaking down the general descriptors into sub-descriptors. These sub-descriptors should allow for variation in how they are actually incorporated into and included in a degree programme. The relevance of each sub-descriptor will differ from academic field to academic field as well as between individual degree programmes. It might also be required to accommodate these per academic field to do justice to the (role of the) discipline in society.

The four dimensions that have been identified in the CALOHEE framework model and which it is proposed should be included in the category / parameter of 'civic, social and cultural engagement' are:

1. Societies and Cultures: Interculturalism;
2. Processes of information and communication;
3. Processes of governance and decision-making;
4. Ethics, norms, values and professional standards.

Together, they cover most of the items included in the European key competences framework, the Australian Government 'Civics & Citizenship Education Professional Learning Package', and other frameworks for civic competencies and engagement as well as a number of documents related to ethics and professional standards. Reflection on these documents has resulted in a framework which is open for further revision. The framework is presented as a stand-alone and could as such be added to any subject area conceptual framework as four additional (general) dimensions.

CURRENT DIAGNOSIS

Tolerance regarding other cultures, religions and even well-defined opinions has been put under (often severe) pressure by current world events concerning migration, terrorism, sustainability and economic disruptions. There is an apparent tendency to look for safety and security by retreating to one's own local community and creating distance from 'the other'. Through social media so-called misinformation and fake news have been introduced and

widely distributed, often with a clear underlying commercial dimension. This phenomenon, and also misleading information resulting from ‘quoting politicians’ by traditional news media, has undermined the reliability of news reports. In a very short time, ‘fact checking’ has become a profession in itself. Part of the same discourse is the denial of the value of experts’ opinion in policy making and decision making processes in general, with clear examples in the underpinning of economic policies and the dangers of climate change. The introduction into the public dialogue of so-called ‘alternative facts’ is symbolic in this respect. In practice, it means that the significance of science as a basis for running and organizing our societies is subverted, and in general its credibility is undermined. It has also implications regarding the importance of upholding ethical principles and values as well as for professional standards, for keeping these societies sustainable.

Another remarkable phenomenon is the growing interest in ‘the self’ which finds its perhaps most obvious expression in selfies, but also in blogs and in particular flogs (fake blogs which disguise the real identity of the creator). These are not only forms of self-expression, which should be perceived as positive, but often veer more towards exhibitionism. In more negative terms this has been an inspiration for / has culminated in ‘me first’ behaviour with consequences for behaviour and for ethical commitment. Self-enrichment and optimising individual profit fit in this picture. For obvious reasons this is related to neo-liberalism, but also is an outcome to the widening of the gap between the haves (those who manage well) and have nots (the victims of neo-liberalism and globalisation). Civic, social and cultural engagement have suffered as a consequence, which has put the welfare state and the sustainable (multi-cultural) society under severe pressure.

Should these reflections be a concern for Higher Education (HE) institutions and their degree programmes? According to the role of HE in society as it is perceived by CALOHEE, it should. The transmission to new generations of societal norms and values, and basic principles of cooperation and tolerance, has for long been seen as a responsibility of both parents and primary and secondary education. Although it has been argued that HE has an obvious role in preparing students for active citizenship, in practice it is not part of (most) existing curricula, or at least not made explicit in the outcomes of the formal learning programmes. Given the developments described above, which can and should be understood as current and future challenges, there seems to be an obvious responsibility for HE. Because HE prepares the next generation of societal leaders, it influences – at least partly – their future behaviour and therefore society as a whole.

ANALYSIS OF CURRENT FRAMEWORKS

The call to devote attention to active citizenship, or in CALOHEE terms ‘civic, social and cultural engagement’, is not new. Already in 2001, it was defined as an integral part of the Tuning approach. Also, the European Commission highlighted its relevance in its European Reference Framework identifying 8 key competences for Lifelong Learning ^[1]. One of these competences is ‘social and civic (competences)’, another one is ‘cultural awareness and expression’. These were published in December 2006 as a formal EU recommendation and in particular meant for secondary education. However, they are very relevant for HE as well.

Competences are defined in this framework as ‘a combination of knowledge, skills and attitudes appropriate to the context’. They are those ‘which all individuals need for personal fulfilment and development, active citizenship, social inclusion and employment’. According to the framework social and civic competences

include personal, interpersonal and intercultural competence and cover all forms of behaviour that equip individuals to participate in an effective and constructive way in social and working life, and particularly in increasingly diverse societies, and to resolve

conflict where necessary. Civic competence equips individuals to fully participate in civic life, based on knowledge of social and political concepts and structures and a commitment to active and democratic participation.

It is an important document in the context of CALOHEE and therefore deserves substantial coverage, in particular because it relates to many of the issues and concerns mentioned in the introduction to this paper, but also because it addresses civic, social and cultural topics explicitly.

In the EU framework social competence is linked to personal and social well-being and successful interpersonal and social participation in society, making the argument that

it is essential to understand the codes of conduct and manners generally accepted in different societies and environments (e.g. at work). It is equally important to be aware of basic concepts relating to individuals, groups, work organisations, gender equality and non-discrimination, society and culture.

It is also thought essential to understand

the multicultural and socio-economic dimensions of European societies and how national cultural identity interacts with the European identity.

as the core skills of this competence

include the ability to communicate constructively in different environments, to show tolerance, express and understand different viewpoints, to negotiate with the ability to create confidence, and to feel empathy.

It is also mentioned that

individuals should be capable of coping with stress and frustration and expressing them in a constructive way and should also distinguish between the personal and professional spheres.

It therefore requires

an attitude of collaboration, assertiveness and integrity. Individuals should have an interest in socio-economic developments and intercultural communication and should value diversity and respect others, and be prepared both to overcome prejudices and to compromise.

According to the framework civic competence requires

knowledge of the concepts of democracy, justice, equality, citizenship, and civil rights, including how they are expressed in the Charter of Fundamental Rights of the European Union and international declarations and how they are applied by various institutions at the local, regional, national, European and international levels.

It also stipulates 'knowledge of contemporary events, as well as the main events and trends in national, European and world history', as well as the development of awareness of the aims, values and policies of social and political movements. Finally, it expects that EU citizens have 'knowledge of European integration and of the EU's structures, main objectives and values, as well as an awareness of diversity and cultural identities in Europe'.

In the framework text it is stated that

skills for civic competence relate to the ability to engage effectively with others in the public domain, and to display solidarity and interest in solving problems affecting the local and wider community. This involves critical and creative reflection and constructive participation in community or neighbourhood activities as well as decision-making at all levels, from local to national and European level, in particular through voting.

It asks for full respect and a positive attitude, arguing that

for human rights including equality as a basis for democracy, appreciation and understanding of differences between value systems of different religious or ethnic groups lay the foundations.

This implies

displaying both a sense of belonging to one's locality, country, the EU and Europe in general and to the world, and a willingness to participate in democratic decision-making at all levels. It also includes demonstrating a sense of responsibility, as well as showing understanding of and respect for the shared values that are necessary to ensure community cohesion, such as respect for democratic principles. Constructive participation also involves civic activities, support for social diversity and cohesion and sustainable development, and a readiness to respect the values and privacy of others.

As part of the key competence 'Cultural awareness and expression' it is thought essential to understand the cultural and linguistic diversity in Europe and other regions of the world, and the need to preserve it. This requires 'a solid understanding of one's own culture and a sense of identity' as 'the basis for an open attitude towards and respect for diversity of cultural expression'.

The Key Competences Framework celebrating its 10th birthday motivated the European Commission to organize an extensive review of the Framework, which was launched mid-2016 and recently reached the level of a public consultation which was implemented from February to May, 2017 ^[2]. In June 2017 a closing conference is scheduled. It should offer input for making informed changes in the present framework and the process should enhance a sense of broad ownership, as it involves a range of stakeholder groups.

It is made explicit in the defined Consultation Strategy paper that it aims to tackle a number of issues. Besides referring to the skills mismatch, it also mentions the Paris Declaration of March 2015 and the ET Joint Report of November 2015 in which the role of education is stressed, to

ensure that pupils acquire solid social, civic and intercultural competences by promoting democratic values and fundamental rights, social inclusion and non-discriminating, as well as active citizenship.

Both documents also call

for enhancing critical thinking and media literacy, particular in the use of Internet and social media, so as to develop resistance to of discrimination and indoctrination.

It is noted that the European Key Competences Framework needs updating

to reflect political, social, economic, ecological and technological developments since 2006, such as migration, globalisation, digital communication, the increased importance of STEM skills and social networks, and sustainable development issues. ^[3]

It is also interesting that many of the competences that have been formulated for upper secondary education can easily be applied to HE, because clear level indicators are lacking. Blooms' taxonomy of measurable verbs does not help us here. What to make of engaging, developing, defining and exercising, recognising and understanding, identifying, applying, creating, fostering, raising, having and building?

In March 2016 the Council of Europe published, *Competences for Democratic Culture: Living together as equals in culturally diverse democratic societies* ^[4] which offers a conceptual model of 20 generic competences clustered in four groups: values; attitudes; skills; and knowledge and critical understanding. By values is meant human dignity and human rights,

cultural diversity, valuing democracy, justice, fairness, equality and the rule of law. The label attitudes encompasses openness to cultural otherness and to other beliefs, world views and practices as well as civic-mindedness, responsibility, self-efficacy and tolerance of ambiguity. Skills have been identified as autonomous learning, analytical and critical thinking, listening and observing, empathy, flexibility and adaptability, co-operation, conflict-resolution and linguistic, communicative and multilingual abilities. The knowledge category lists knowledge and critical understanding of the self, knowledge and understanding of language and communication as well as the world, in terms of politics, law, human rights, culture, cultures, religions, history, media, economies, environment and sustainability. ^[5 & 6]

THE CALOHEE FRAMEWORK

The documents mentioned above, supplemented with some other sources, offer a rich range of the items that can be covered in HE giving substance to 'civic, social and cultural engagement'. Taking the current developments as described in the introduction as a basis, four dimensions have been identified, which together should make up the CALOHEE framework of general descriptors for 'civic, social and cultural engagement'. These four dimensions are perceived as the minimum to be covered in all HE programmes. As in the case of the domain / subject area frameworks, each dimension includes a knowledge descriptor, a skills descriptor and a (wider) competence descriptor. The general framework may be turned into an Assessment Framework by breaking down the general descriptors into sub-descriptors. These sub-descriptors should allow for variation in how they are actually included in a degree programme. The relevance of each sub-descriptor will differ from academic field to academic field, as well as within individual degree programmes. It might also be required to accommodate these per academic field to do justice to the (role of the) discipline in society.

Reflection on the documents that address the related types of frameworks has resulted in the following framework:

1. Societies and Cultures: Interculturalism

- Demonstrate critical understanding of commonalities and differences in and between societies and cultures (Knowledge)
- Identify, describe and analyse issues in and between societies and cultures (Skills)
- Demonstrate engagement by developing scenarios and alternatives and / or identifying best practices of interaction between societies and cultures and - if required – interventions in case of tensions and / or conflicts (Autonomy and responsibility)

2. Processes of information and communication

- Demonstrate critical understanding of the processes of information and communication (knowledge)
- Review and judge (mis)use of sources, data, evidence, qualities, intentions and transparency, and expert opinions (Skills)
- Active contribution to societal debates using reliable data and information sources and informed judgements (Autonomy and responsibility)

3. Processes of governance and decision making

- Demonstrate critical understanding of the processes of governance and decision-making (knowledge)

- Apply and support agreed governing principles, norms and values regarding fairness, transparency, accountability, democracy and relevance in policy making processes (Skills)
- Active contribution to and with local and (inter)national communities, community groups, (political) organisations and pressure groups respecting agreed principles, norms and values (Autonomy and responsibility)

4. Ethics, norms, values and professional standards

- Demonstrate critical understanding of general ethical principles, norms and values and professional standards (Knowledge)
- Understand and apply the processes of decision-making and the consequences of actions taking into account principles, norms, values and standards both from a personal and a professional standpoint (Skills)
- Active contribution to upholding, promoting and defending general ethical principles, norms, values and professional standards in governance, communication and cultural interaction. (Autonomy and responsibility)

CONCLUSIONS

The descriptors included in this framework have not been related to a particular level such as first or second cycle, levels 6 and 7 of the EQF, or Bachelor or Master. These descriptors have been broken-down to sub-descriptors and defined as measurable learning outcomes statements. The framework is presented here as a stand-alone one and could as such be added to any subject area conceptual framework as four additional (general) dimensions. It is a proposal that it is expected to be included and adopted by different subject area groups and developed further to accommodate the requirements in each subject area and further developments in the framework to respond to changes in society.

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