Validation of the Open Recognition Framework, developed for the Erasmus+ project MIRVA: Making Informal Recognition Visible and Actionable

O5 - GUIDELINES FOR LINKING INFORMAL RECOGNITION WITH FRAMEWORKS
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Guidelines for

**Linking Informal Recognition to Frameworks**

**Guidelines for Deployment**

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1. Mainstreaming Open Recognition practice

The present document aims at addressing the emerging needs for establishing interoperable and contextualized recognition frameworks, at local and community level, which could at the same time prove capable to refer to existing formal validation frameworks, so that social inclusion and mobility in the labour market are being served by meeting quality and professionalism.

Within the course of the MIRVA project partners worked upon and elaborated solutions to meet the needs of the individual and of the community as well as of the practitioners and the organizations, in terms of recognition of one’s capacity to deliver in practice on certain tasks and even jobs. In other words, informally recognizing one’s adequacy of traits and qualifications to perform accordingly in the context of a community, a community of practice, a professional group and even an organization (structured community of practitioners/professionals to perform specific tasks and provide with intermediate or final outputs, goods and services).

Evidently, one of the major issues in the afore-mentioned “recognition agenda” is related to the concern of ensuring the potential of the recognized - according to a community (or group) identified framework - individuals to join another community, group of professionals, organization and even another (national) labour market, carrying the already recognized traits and qualification while in another context – with potentially differing work delivery needs. It is this concern which makes valid the relevance of the existing national, professional or other formal qualifications frameworks as formal recognition frameworks and especially the linking of the latter with the informal, “open” recognition practice.

According to our understanding, presented in the MIRVA Discussion Paper (O5), as it regards the issues for “Linking Informal Recognition to Formal Frameworks”, the “open recognition” practice is here to stay, becoming an indispensable part of the lifelong learning, personal and professional development ecosystem. Because the deployment of the flexible (open) recognition schemes are becoming necessary for

- **the individual, the professional and the expert**, whoever wishes to systematically increase her/his autonomy and upgrade her/his employability, by having access to user-friendly means (applications) valorizing her/his lifelong learning experiences; and for

- **the organizations, associations and groups of individuals at local and or community level**, which continuously and ever more frequently have to address local, organization or community specific and basically contextualized skills’ needs, in the geographically and organizationally identified labour systems.

And last but not least, the “open recognition” practice is becoming indispensable, because the “open recognition schemes” prove to be widely useful in order to address the frequently detected **gaps between the labour market needs and the rather slowly adapted human capital development (up- and re-skilling) offers**.

In this context, we expect that, during the first half of the 21st century, the grass-roots open - and flexible - recognition practice will co-exist and serve interchangeably individuals, communities, organizations and the labour markets as well as the societies at large, together with the top-down formal recognition and accreditation frameworks. And in order to ensure the due inter-operabilities and the smooth transitions from education to work and vice versa as well as labour mobility between industries, regional and national markets and occupation clusters, including mobility between communities of culture, helping social integration, we are, in this document, shedding light on the “linking pathways” (“bridges”), when moving from the level of the **individual** and the **community** towards the one of the **organization** and the **economy** (labour market) and vice versa.
In the course of the MIRVA project we have further enhanced and developed the ways through which individuals, communities as well as professionals and organizations can valorize their own and those learning and work experiences of the others, while qualifying for further learning and or for entering a community or even being assigned with certain roles, responsibilities and tasks to deliver. And in this respect, we propose the adoption of the following metaphor as it regards the relation between the grass-roots **Open Recognition** schemes, to be deployed among trusted entities, while the "top-down" formal recognition frameworks to serve as "guarantors of trust", whenever needed, in order to make feasible any type of trusted open recognition. With the latter to become recognised by the (top-down) formal (external) validation and assessment of qualifications, acquired through work and learning experiences.

We also observe an ever-wider adoption of open (flexible) recognition schemes to cover specific needs at the grass-roots level. Together with a parallel effort by authorities, accreditation bodies and agencies to develop ("top-down") and mainstream **meta-frameworks of composites of knowledge and skills**. This is led by adopting the concept of “competence”, that corresponds to the level of capacity to deliver a specific task or set of tasks, together with the term “competency”, which refers to the partly or fully successful perse delivery of these tasks. While by deploying in parallel a more holistic approach to what we refer to as the capacity to perform – or deliver tasks -, which is adopting the concept of the “competence to acquire new skills and (relevant) knowhow” and, thus, to perform relatively easily against a broader range of skills and jobs, by enhancing individuals’ adaptability accordingly.

This is the reason why the approaches in order to **measure the capacity to perform and also to measure the human capital developed** have systematically adopted the concept of the “transversal skills” – or otherwise of the “key competencies” (when referring to learning at school ages) -, pointing to those **fundamental skills which critically identify the individuals’ lifelong learning and personal and professional development capacity**. These are the **competences which affect** and, at the same time, **measure the individuals’ performance to deliver**, in terms of project-based and collaborative learning and working, adequately expressing her/himself and communicating via the digital means, and showing understanding and tolerance, coupled with creative leadership in multicultural communities. According to this trend, such “**competence frameworks**” are recently being developed and validated by communities of experts always through the “top-down” approach, in the course of the last two decades and gradually being adopted by international agencies and collective professional bodies, **building on the “transversal skills” or “key competencies” perspective, in order to**

(a) increase the lifelong learning capacity of the individuals and help the transition from school (education) to work and (the case of the LifEComp framework);

(b) facilitate the up-wards and horizontal mobility through learning and professional development pathways (the case of the European Qualification Framework - EQF);

(c) accommodate the transition of critical organization functions towards new operational models, with the wide-spread use of the digital technologies through the assessment of the capacity level of individuals and organizations in terms of using the digital means to work effectively and address the increasing needs for innovative and creative entrepreneurship in the 21st century (the case of the e-CF - e-Competence Framework, the “DigComp” and the “EntreComp”); and

(d) provide with a “universal platform” or a “meta-framework” to support the portability of qualifications (skills and competences to deliver) across jobs, occupations and sectors, thus enhancing labour market mobility (the case of the advanced “European Skills/Competences, qualifications and Occupations”, “ESCO”).
According to the experience of the last - at least thirty years -, the wide adoption of open (flexible) recognition practice and corresponding solutions will gradually strengthen the valorization of varying forms of both the formal and informal learning experiences, thus becoming indispensable for the individual and the professional of the 21st century. While helping at the same time the community, the association as well as any type of organization, which by adopting this practice and the validation of open (informal) recognition solutions will provide their members with ever increasing opportunities to valorize whichever task, work and other work-placed or community-related experience, towards those members’ own learning and personal and professional development. In the long run thus turning such working or collaborating places to de-facto “learning labs”.

On the mid-term basis, the most promising types of activities and labour ecosystems for the open recognition schemes to be adopted are those of the community support services and social care and guidance. Especially when related to those jobs, whereas competencies are mainly experience-based and qualifications need to be identified through evidence-based practice. By linking also to formal recognition schemes this specific service industry (cluster of activities) will significantly enhance the quality of its output to the benefit of social cohesion.

### 2. Interoperable Recognition Patterns

Formal education degrees, as a top-down practice specified by the academic experts in the various “knowledge domains”, will stay on in order to serve the certification of knowledge acquired and the capacity to perform further in terms of academic and research work. While, a similar top-down practice adopting formal recognition frameworks to certify the capacity to perform and deliver on specific “technical skills” will be lagging behind, becoming obsolete, turning to an ever increasing barrier to the mobility in the labour market and to the development of the capacity of people to become more autonomous economic agents and of the communities to become more socially integrated.

We have reflected upon the validity of the open recognition practice, further enhancing the ways through which individuals, communities as well as professionals and organizations can valorize their own experiences and those of the others, while qualifying themselves for further learning and undertaking responsibilities and tasks to deliver. And we aim at addressing the needs of the various target groups - potential beneficiaries -, both those of the individuals and the ones of the members of collective bodies of entrepreneurial and or of social interests, in other words the needs of

1. the **communities of practice** and those of the **experts and professionals**, and the needs of
2. the **organizations** and the **learning providers** and of
3. the **formal recognition bodies and authorities** as well,

in order to bridge the practice of the open recognition, usually attached to the “local” and the “proximal” context, with the widely prevailing practice of accreditation and certification, through validation, for the afore-mentioned communities and stakeholders.

The scope of the “bridging” - or “linking” as it is also termed - lies with the emerging necessity for making the “recognition of traits and qualifications” of an individual a personalized experience and eventually a personalized service. In other words, giving to the person the opportunity to make use of user-friendly procedures and corresponding “tools”, anytime and anywhere, in order to assess and valorize her/his qualifications and competences against duly personalized “frameworks” in varying contexts. This is useful in the “local” and “proximal” context, so that each person could enhance her/his capacity to contribute to the community, especially when addressing specific problems in the specific
community context, and so that the community – or organization - could enhance its potential human and social capital available. Whereas the individual would be offered the opportunity to assess his/her capacity level as it regards the specific tasks needed, in the community setting, so that he/she could prove really useful for that community.

And, still further, such an option offered to the individual, is becoming even more useful for this person’s personal and professional development as long as these personalised and peer-based recognition schemes could be “linked” (“bridged”) to those prevailing formal recognition processes. So that the individual or even the organization, entreprise or any other body somehow related to that individual, could assess her or his competence level (capacity to deliver), against a usually widely deployed formal recognition (certification/accreditation) scheme. In this respect, further to the obvious benefit that both the individual and the organization/body interested in her/him could make of this, one could even further think of the potential impact of such a common – among the individual and the related body – understanding, reached in this way, on the wages and the labour market. Facilitating mobility among different jobs and industries and limiting the so-called search frictions, while increasing the impact on expanding employment.

To this end, we have identified concrete “dimensions of relevance”, where varying context and different types of recognition of individuals’ competences and qualifications occur, in order to specify modularities, which could be considered parts of a continuously (lifelong) developing puzzle of qualifications of a person. Which could occasionally be matching to existing, widely adopted bundles of job/delivery tasks and “occupational profiles”, as it could happen with the case of the formal recognition frameworks.

In the following table we are identifying three such “dimensions”, namely

(a) **the level of reference of the “recognition scheme/practice”**, corresponding to the range of impact of the recognition scheme being adopted;

(b) **the context in which the “recognition practice” is being adopted** and implemented, referring to the ecosystem where the needs of recognition are originally perceived, comprising value systems, work and collaboration structures, and, last but not least,

(c) **the scope – or rationale – being served by the specific “scheme/practice”** or, in other words, the anticipated benefits in terms of valorization of learning and personal and professional development experiences, from the adoption of the specific “recognition scheme” and the implementation of the “recognition practice”.

We are thus pointing to certain anchoring elements which constitute a “generic” identification scheme in order to base the documentation of a new “kind” (“genre”) of evolutionary recognition schemes, through such a three-dimensional perspective to foster

- the emerging “recognition” needs, being brought up with the varying demand of labour in an ever-wider range of jobs in the economies of the 21st century, being potentially identified within the context of the communities as well as of the clusters of professionals and of the organizations; and also to analyse and thus link to

- those existing formal recognition frameworks, which either (i) assess the outcomes of formal or non-formal learning processes or (ii) the level of capacity (performance measure) of an individual to deliver specific tasks, usually corresponding to certain occupational profiles.

Such an “identification scheme” could be capable to provide with personalized recognition solutions and drive the “skills/qualifications recognition practice” to an enhanced state-of-play, while facilitating multi-purpose skills development through grass-roots activities and on-the-job training.
An important aspect we would like to point to as it regards the afore-mentioned three dimensions, in the following table, is that formal recognition systems and practice, referring to either the learning outcomes (achievements) and or skills and abilities, would be positioned in the bottom left part of the table, when drawing a diagonal line, from the top left to the bottom right corner of this table.

### MATRIX - Identifying dimensions for “Linking Formal to Informal Recognition” through the genre of the “Evolutionary Recognition Frameworks”

<table>
<thead>
<tr>
<th>Level (Granularity and Scale)</th>
<th>Context (mainly identified at/in)</th>
<th>Scope (mainly addressing)</th>
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<tr>
<td>MICRO-Level: Grass-roots needs, related to local social fabrique, and valorization of non-formal and informal learning</td>
<td>Local communities and associations with specific skills’ needs and social inclusion priorities</td>
<td>Social recognition, sharing of capacity, inclusion intensive, multicultural, valorizing learning experiences mainly through practice</td>
</tr>
<tr>
<td>MESO-Level: Making “informal recognition” processes “fit-for-purpose”</td>
<td>Groups of experts and professionals, organizations, employment mobility schemes</td>
<td>Bridging individuals’ development pathways with professional, formal/structured competence frameworks</td>
</tr>
<tr>
<td>MACRO-Level: Meta-level Recognition Regulatory Framework</td>
<td>Clusters of industries and occupations, national/country and international settings, authorities and regulatory bodies</td>
<td>Supporting mobility, equal opportunities, inclusion, human capital growth, adopting quality criteria and interoperability benchmarks for the new genre of “recognition schemes”</td>
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The afore-mentioned “relevance dimensions” enhance our means to deploy self-assessment and valorization as well as formative assessment, whenever necessary, of skills acquired and competences developed through working practice and informal learning experiences, as well as the means to measure the collective outcomes of groups of people, experts and professionals, while at the same time

- ✔ aligning to formal recognition schemes, thus contributing to the latter’s evolutionary perspective, through
- ✔ the building of customizable Recognition Frameworks (“evolutionary”) and thus facilitating
- ✔ evolving pathways to the consolidation of competencies for both individuals and communities (groups of individuals) with a friendly way.

### 3. Open Recognition Pathways

Productivity in the Fordian production model of most of the 20th century was critically identified by the individuals’ preparedness to understand the world around and abide to a “value system” and also to get employed and deliver on pre-defined tasks, without significant changes in the course of major parts of their employment life cycle. Understanding the world and adopting (or abiding to) a “value system” has been facilitated through pre-school and school education, while becoming employable has been and is still being served by accredited university education and vocational education and training, either formal or non-formal.
Further on, there has been significant effort by national, international and more specifically European institutions, in the name of fighting unemployment and facilitating sustainable growth and, eventually, of increased labour mobility, in order to build and validate industry-led taxonomies of occupations and tasks (as of the ISCO by UN). With such an effort aiming at increasing (“fit-for-purpose”) preparedness of individuals to deliver specific tasks, this way eventually increasing labour productivity as well as addressing the labour markets’ structural problems that are often related to expanded business cycles.

With the further specialization of jobs in the sixties (1960’s), the seventies (1970’s) and the eighties (1980’s), more advanced solutions have been adopted in certain cases (countries), especially in those where state authorities, overseeing education, human capital development and labour markets have worked closely with the industry to produce a first generation of “Competence Frameworks”. By bringing together the taxonomies of jobs and tasks to perform upon to those of knowledge, skills and abilities, in a rather exhaustive way as it is the case with the US Labor Department’s “Occupational Network” – the “O*Net.” Such an “Occupations & Skills & Competences” framework has eloquently, successfully and usefully been widely adopted, but only in the case of the US labour and professional development services’ markets.

Still and despite the increasing demand for insightful diagnosis of emerging skills’ needs, by both the industry and the education and labour market authorities, with important anticipated benefits in terms of the containment of unemployment and support of employment through the upgrading of the initial vocational education and training and continuous professional development, education authorities in most developed economies have persistently been deploying the top-down approach by (i) certifying the quality of the learning outcomes and (sometimes) of the learning processes and (ii) using the former (learning outcomes of IVET and university degrees) as proxies of the individuals’ abilities to deliver upon tasks and certifying their competences accordingly. While, in order to facilitate human resource management and containing the employability cost of the individuals, industry have moved on both with training certification and with the accreditation of professional competences for certain occupations (“occupation clusters”), especially in those globalized industries of the ICTs, accounting, auditing, etc., management and logistics and business administration, where competencies’ certification schemes with international validity have been adopted to serve the employers and the professionals for jobs’ brokering and business and professional development.

It has only been in the late 1990’s and early in the first decade of the 21st century, that groups of experts and policy makers working at the European level and with the scope of making the European labour market work – increasing labour mobility among national markets -, have pursued an approach towards building meta-frameworks with the aim (i) to provide with comparable references to formal recognition outcomes, serving both formal and non-formal learning, and (ii) to support the effort of capacity building for both individuals and organizations, to address the emerging digitally enhanced business ecosystem. Evidently, these meta-frameworks are adopting a typical “top-down” approach, addressing all levels as in the table, without any “contextual dimension”, but mainly serving valorization and certification of individuals’ competences, through external (formal) recognition schemes, with global validity (as with the “Scope” dimension in the table).

In this context, the European Commission, DG Employment, Social Affairs and Inclusion launched the initiative to build and validate the European Skills, Competences and Occupations (ESCO) system, aiming at developing a common space of understanding and enabling providers, learners, employers and employees to make use of the qualifications in a practical and, at the same time, institutionalized way. Since it has been set-up, it operates as a “common reference language”, e.g. like a European Dictionary, describing, identifying and classifying professional occupations, skills, and qualifications relevant for the EU – and the international - labour market and the education and training systems. The ultimate goal
is to support closing whichever “recognition gaps” between different national labour markets and between the domains of employment and of the education and training.

It increases transparency of occupations, qualifications, skills/competences and learning outcomes. This transparency and common reference helps people to exchange information with unambiguous and shared meaning, independent of the language and the electronic systems used. Furthermore, as a tool for classifying qualifications, it is linked to relevant international classifications and frameworks, e.g. the International Standard Classification of Occupations (ISCO) and the European Qualifications Framework (EQF).

The ESCO system includes three “key pillars” as it follows:

(I) The Occupations’ pillar: including at present more than 3,000 occupations and using hierarchical relationships between them, metadata as well as mappings to the International Standard Classification of Occupations (ISCO), in order to structure the occupations.

(II) The skills’ and competences’ pillar: also referred to as the “skills pillar”, providing a comprehensive list of skills that are relevant for the European labour market – and potentially for the developed economies’ ones. ESCOv1 contains 13,485 skills. The skills pillar distinguishes between i) skill/competence concepts and ii) knowledge concepts by indicating the skill type. There is however no distinction between skills and competences.

(III) The Qualifications’ pillar: collecting existing information on qualifications, with the objective to provide a comprehensive list of qualifications relevant for the European labour market. The ESCO Qualifications’ pillar includes 8,677 qualifications. Qualifications displayed in ESCO come from databases of national qualifications that are managed by the European Member States.

The “ESCO” actually consists in a dynamic “competence (meta-)framework”, to be easily upgraded and also customizable whenever necessary, to bridge with open (grass-roots) recognition practice, even becoming the “guarantor of trust” to mitigate valorized learning and skills to other communities (or organizations), from the one where they have originally been validated.

Based on common understanding, recognition and certification follow validation, and validation follows assessment. Many people dispose knowledge and skills obtained through non-formal or informal learning, with this fact being occasionally – if not frequently – an obstacle in their career advancement. In order to eliminate such “recognition gaps”, the European Council developed the “Council Recommendation of 20 December 2012 on the validation of non-formal and informal learning”. This recommendation delineates validation in four phases:

1. Identification
2. Documentation
3. Assessment
4. Certification
The following steps are at the heart of the process:

- **Identification** of an individual’s learning outcomes acquired through non-formal and even informal learning, mainly in terms of skills and competences to be upgraded.
- **Documentation** of an individual's learning outcomes to be acquired through non-formal and informal learning, through the use of indicators in order to measure the progress against those (values of) the indicators (with the assessment)
- **Assessment** of an individual’s learning outcomes acquired through non-formal and informal learning
- **Certification** of the results of the assessment of an individual’s learning outcomes acquired through non-formal and informal learning in the form of a qualification, or credits leading to a qualification or in another form, as appropriate.

These recommendations also point to validation arrangements being linked to the EQF and EQF-related schemes for learning and formal recognition of learning outcomes. It is important to mention that the first three of the above steps, for the validation of learning outcomes, should also be better followed whenever the individual wants to join any sort of up- or re-skilling program, as a widely accepted “good practice” for the “assessment of prior learning and experience”. And that the first two steps of the validation should better be followed even in the cases whenever grass-roots open recognition practice is being adopted, when the valorization of one’s learning or when the endorsement of skills and competences by a group of peers takes place.

We further focus on these two steps in order to develop an ecosystem of evolutionary recognition frameworks, which will support all aspects of the valorization and also of the certification, whenever necessary to bring about multi-purpose solutions for social inclusion and labour mobility. It is in this direction that the **European Commission** has come up with the **EU Skills Profile Tool for Third Country Nationals** (2017), in order to be used by intermediating and hosting and guidance organizations, to support further steps of valorization and even (formal) recognition of these people’s prior learning and experience. The “tool” has been built as an open source code and its “plug-in” functionalities are described in the relevant link. The *EU Skills Profile* constitutes an interesting case of reference where the scheme meets the “context” and “scope” sensitive “dimensions”, while still being set up as a top-down practice, to be followed under formal “recognition” processes.

According to the “formal recognition frameworks”, assessment precedes validation, which precedes certification and recognition. Based on the overview of the afore-mentioned frameworks, we have noticed that the “learning outcomes” are in the center of all of them, and that most of them could easily be linked to the **European Qualifications Framework (EQF)**. The latter also includes descriptors related to “learning outcomes”. According to the three-dimensional matrix, the EQF has been built in order to work at the **MESO-level**, as it regards the “reference (scale/granularity) level”, aiming at facilitating industry-specific professional skills’ frameworks, to support formal recognition (certification) of technical skills, to be mirrored to broader scale frameworks like the ISCED degrees’ framework and the ESCO, meta-framework relating to other industries and occupations – in a way bridging the **MESO-** to the **MACRO-level** according to the “reference (granularity/scale)” dimension in the **Matrix**. As it regards the dimensions of both the “context” and “scope”, the **EQF** mainly serves both industries and occupation clusters as well as the economies at large, while it is widely adopted in order to help mobility and social integration measures and policies.

Further on, it seems that varying versions of the (formal) recognition frameworks currently adopted, some of them already being based on – or liaising to - the ESCO (“meta-framework”), can mainly be meeting the characteristics relating to either the “MACRO-” and or the “MESO-level”, according to the “reference (granularity/scale) level” dimension. And, additionally, these (formal) frameworks can occasionally be, to some extent, meeting the
characteristics relating to the “scope” (dimension), by addressing the benefits in terms of learning outcomes in the case of professional development and broader policy implementation needs (re- or up-skilling programs and social inclusion policies). These frameworks and the corresponding deployment practice (of formal recognition) are thus limiting their potential impact on serving the recognition of “qualifications” which may be acquired – or developed - at the grass-roots and the community level. And especially the recognition of those “qualifications” with a social inclusion perspective, while at the same time, not serving any sort of learning outcomes, especially those achieved through working and informal learning experiences, to be “shared” (trusted) by other groups of individuals and professionals, thus meeting the social mobility objective.

In this context, linking the (European) formal recognition frameworks with the informal (open) recognition practice comprises a promising field for the broader and more rewarding use of the formal recognition means. And in this respect, the “identification” and “documentation” of the anticipated learning outcomes (as presented earlier) become critical steps for establishing those links to the formal recognition processes, thus anticipating “trust benchmarks” to both the non-formal and the informal learning processes. Hence, it would make sense to identify “mechanisms” (“mapping tools”) to correlate outcomes of informal learning and working experiences with pre-identified learning outcomes to be achieved according to the formal recognition frameworks; this is proving easy to implement through the “digital means” of any type of recognition (e.g. open badges, as the issuer could define a set of learning outcomes for each badge), but quite more complicated for the informal and non-digital recognition, where communities and professional bodies should undertake action.

4. Guidelines for the deployment of Open Recognition Pathways

We consider potential “recognition pathways” in order to reflect upon the available options of the “evolutionary recognition frameworks”, to support all sorts of “personalized recognition services”, with joint grass-roots based and top-down conceived schemes of valorization of learning experiences.

It is useful, in this regard, to reflect upon whichever variations exist as it concerns the needs for trusted “personalized (open) recognition services” among the settings where individuals become active and contribute as social actors, at the community level and when they co-work and contribute in the context of professional, production oriented settings of organized work structures.

Ever more activities are organized and delivered through digital means and a lot of them with online processes, and both the labour markets and the local communities require the individuals to develop frequently changing skills and be able to “convey evidence” of their qualifications, accomplishments, aspirations and motivations, in a way complementary to their other formally recognized qualifications, like the degrees, training certificates, etc. As it has been exemplified, a person’s qualifications encompass more than her/his formal learning certifications, including other sort of evidence of informal learning recognition, by other people, community (association, group of common interests, network, etc.) members who trust the individual and those she/he trusts as well, especially in her/his communities, as these communities are also expanding their use of digital means looking for appropriate profiles of these individuals.

In order to be ready for such evolutions, both individuals and communities need to act upon their recognition, but also upon the one of others. This is the way we identify the open recognition practice. While individuals become more active making themselves capable of valorizing informal learning experiences, meeting their emerging everyday needs, on the other side communities also become capable of identifying and activating their social capital to address local needs, in terms of serving those in need and ensuring social cohesion.
Employees, professionals and practitioners would significantly enhance the potential for their skills and competences to become identifiable both by potential employers and other organizations, also deploying digital means from their side and looking for appropriate profiles of individuals, their knowledge and know-how. Whether the latter are acquired formally (school, training organization) or informally (in work, leisure, social life). In such a context, by deploying open (flexible) recognition practice, through evolutionary recognition pathways, ensuring the synergies when bundling valorization of informal learning experiences together with other types of formal qualifications for individuals, who are working together in organizations and professional bodies, these organizations are increasing their innovation potential, while becoming trusted incubators of open recognition practice.

The drive towards the increasing potential and the wider deployment of open recognition practice and of the emergence of personalized recognition services, may prove significant in terms of enhancing the quality of the ecosystem of the human capital development providers. Including those adult learning, training and professional development as well as the job counseling and matching agencies, etc. The adoption from their side of the open recognition schemes, being compatible with the individuals’ valorization of informal learning experiences, could significantly increase individuals’ employability, while decreasing whichever “search frictions” in the labour markets.

We have reflected upon our understanding that by developing and delivering solutions in order to cater for personalized recognition services to individuals as well as to practitioners and to communities and organizations, upon their request, could greatly increase the quality of matching demand to supply of skills and corresponding traits and qualifications of individuals and the labour force at large. Thus, providing the right context for boosting employment measures as well as for enhancing social integration measures. Together with the availability of user-friendly “tools” and “interfaces” for those personalized recognition services, to be deployed through interfaces with APIs of open recognition schemes, coupled with the genre of top-down (“formal”) meta-frameworks of competences (DigComp, EntreComp, LifEComp). In this context, easily adaptable digital applications which would boost both human capital development and innovation in the economy, by valorizing informal learning experiences as well as by enhancing skills matching, would greatly improve labour productivity and facilitate distributed collaborative working structures. Interfaces with APIs of open recognition schemes to the genre of top-down (“formal”) frameworks of qualifications (EQF) and occupations and competences (ESCO) need to become available.

Guidelines for the interested stakeholders to introduce processes and practice in the frame of customizable, “fit-for-purpose” and personalized recognition of qualifications schemes, which will be compatible with, while facilitating the user-friendly deployment of relevant “formal recognition frameworks” as integrated parts (“modules”), should be elaborated for a number of typical “personas”. The latter should better carry those characteristics of all the three-dimensions, as being presented in the Matrix, earlier in this document. The "personas" should identify cases corresponding to most, at least, of the combinations emerging among the various levels of the three dimensions, from the micro-level of the individual, who understands her/his needs to valorize any work experience in terms of informal learning and defines ways to make it visible, to the macro-level of the policy-makers and personal and professional service providers, who aim at making their regulatory solutions and their services easily turn to “fit-for-purpose” tools for the individuals, citizens, professionals, communities and organizations and societies and economies at large.

In this respect we could identify these “personas” and a representative number of corresponding cases, in a way which will lead to the identification and validation of Guidelines to (occasionally) link informal/open recognition practice and outcomes to formal recognition procedures. Such cases would be:
(a) **an immigrant and or a young person having become marginalized**, who is ready to build on his initial understanding and to find ways to contribute to her/his immediate community and valorize this contribution as a step towards progressing her/his learning and understanding of her/his wellbeing;

(b) **a citizen becoming engaged in local initiatives** and associations, at the community level, who, at the same time, is

(c) **a professional, building her/his community of practice**;

(d) **a member of staff in an organization, becoming aware of effective innovative practice** to advance business productivity, wants to valorize the practice and consolidate an open recognition scheme to become a de-facto organization up-skilling framework; and

(e) **an expert and policy-maker becoming aware of the potential of joint, “evolutionary” (open) recognition schemes**, to enhance employment support and social integration measures and labour mobility policies.

We are, in line with the above cases, formulating hereby sets of customizable guidelines in order to facilitate the capacity of stakeholders and actors, especially among professionals, organizations and authorities and accreditation and certification agencies, but also among the individuals in pursuing their lifelong personal and professional development, in the context of organizations and communities which make best use of the corresponding human and social capital, with the responsible agencies to ensure the relevant facilitating conditions in the societies and the labour markets. To this end, we are working on the **personas** following in order to foster the **bridging (linking) guidelines** accordingly.

- **Pericles addressing the “Company X” changing recognition needs**

Pericles is a HR Manager in a rather distributed organization, which offers business development consulting support to SMEs in a number of Regions across Greece, helping them to innovate and re-organize themselves and thus diversifying and overcoming significant demand stagnation in the local markets. Pericles is faced with heavy difficulties, in a labour market presenting high unemployment, especially the long-term one and that of the young people, and a labour force which consists of individuals with limited self-confidence, low level of trust and creativity and limited capacity for collaborative work.

His aim is to get those recruits, already from the start when showing at first interest in his organization, becoming familiar with self-reflection and self-assessment and becoming aware about their assessment of professional development in groups with peers. Then, those getting employed, Pericles wants to make them capable of working by networking and collaborating and also systematically deploying their continuous assessment practice in providing consulting to their client SMEs. Focusing on human capital development and adaptability for the reorganization of the SMEs and the development and market positioning of their new products and services, in order to address ever changing demand, by enhancing their innovation together with their capacity to overcome labour market frictions and easily recruiting people with totally different experience and skills' profiles.

**Driving considerations**

- How to overcome the difficulties of a stagnated labour market and at the same time support the quick expansion of his company across the country, by offering demanding human capital development services to facilitate business development of SMEs at local level?

- How to go with the fast-track enhancement of the capacity of his company’ s senior consultants together with the recently recruited ones to consistently embed self- and peer-assessment practice in their everyday work?
How to deploy informal recognition sessions as well as identifying and referring to formal recognition frameworks, in order to encourage the formation of professional development pathways by the company’s consultants while instilling the relevant approach to their client SMEs?

How would the consultants claim their own skills?

How would managers in the SMEs endorse or recognize skills?

Are there widely accepted and comprehensive skills taxonomies that can be used?

Who would have access to these “open” (flexible) recognition schemes? Colleagues (consultants) and peers, managers in the SMEs, people outside the company, the consultant/employee/trainee after ending the relationship with the company?

Should the Company offer tools for issuing credentials and tools to relate self- and peer (open) recognition to formal recognition frameworks?

**Structuring (Company’s) Recognition Pathways**

- Make available a user-centred repository of informal recognition patterns and adopt and recommend a trustable and extendable (open) “Digital Credential” format, eg. “Blockcerts” or “Open Badge” or ...
- Develop a repository of formal recognition frameworks, especially related to transversal skills’ development and consulting skills recognition, providing with access to all and with connected self-customised (informal) recognition (assessment) tools
- Inviting interested job seekers to run self assessment tools and also make them familiar with issuing light credentials towards organizations, occupations or functions (e.g. like, endorsement, light comment)
- Engaging recruits to join seniors’ groups and adopt customizable peer recognition credentials, working with innovative ideas and business development solutions
- Adopting, at management level, updated sets of occupation profiles and corresponding competence assessment and recognition frameworks, to be deployed both in boosting innovation and self-assessment competence among company’s consultants as well as among managers and employees of the client SMEs
- Gradually increasing participation to the networking scheme, with dynamic clustering and flourishing digital credential templates/formats
- Ever increasing and enriching repository of self- and peer recognition patterns and practices
- Establishing “good practice” in the business consulting ecosystem
- Becoming a de-facto standard for job matching and recruiting and sustainable human capital development in clusters of SMEs, across Greek and other European regions
- Increasing face value of formal recognition and accreditation processes through rationalizing the demand for formal credentials in the labour market and social inclusion services

**Bridging guidelines**

**Business Consultants**
- How could I consistently have a good grasp of my competence level and performance potential?
- Availability of and familiarization with self- and peer- assessment and “Open Recognition” tools, to guide client SMEs
- How is portability of “open recognition” outputs to formal recognition schemes ensured

**SME Entrepreneurs**
• How could I consistently have a good grasp of my competence level and performance potential?
• Measurable upgrading of “fit-to-purpose” recruiting and consolidating a functioning rewarding system

**HR Managers**
• Availability of and familiarization with self- and peer-assessment and “Open Recognition” tools, to guide client SMEs
• How is portability of “open recognition” outputs to formal recognition schemes ensured
Measurable upgrading of “fit-to-purpose” recruiting and consolidating a functioning rewarding system

**Accreditation (professional) bodies/agencies (staff)**
• Identifying easily deployed means to enhance mobility in the labour market and provide with low cost human capital development services to the benefit of SMEs’ competitiveness
• Piloting ways for consistent updating of formal recognition frameworks and corresponding procedures

• **Mauro building community recognition patterns**

Mauro is a construction engineer working in a company which is specializing in restoration work in Medieval towns’ centres of Mid and North Italian regions. Infrastructure and buildings’ restoration work is nowadays frequently complemented with - or run in parallel to - large scale social inclusion actions. In such a context, Mauro has already sometime ago become aware of the importance of engaging local communities in such projects which could maximize impact in terms of social cohesion on the social fabrique at grass-roots level.

To make this happen, Mauro has in parallel to his professional activity undertaken a social entrepreneurship role launching, in collaboration with other entrepreneurs a small entreprise (*Cooperativa Sociale*) which provides guidance to the residents of these originally deprived areas in helping those in need of support, either lonely aged people, hard-to-reach young people, migrants and other people with refugee origin, people with disabilities living below the poverty level. His social entreprise (“CS”) is systematically running outreach activities targeted to these people, starting with psychological counseling and self-recognition support, by familiarizing them with making extended use of self- and peer-assessment of skills and competences and, sometimes, providing guidance and preparatory support to further be engaged with formal professional accreditation procedures, in the course of enhancing their employability and eventually become employed or developing their entrepreneurship.

**Driving considerations**
• Upgrading wellbeing of residents of “old cities” or of other deprived urban areas, either as accompanying activities to infrastructure restoration projects or as stand-alone initiatives, through social care enhancing and other social capital building projects;
• How to develop self-confidence and social responsibility among marginalized and hard-to-reach people, by providing them with self-reflection and assessment means and open recognition tools
• How to boost wide adoption of self- and peer (informal) recognition tools and practice, making them verifiable means for upgrading these people’s self-esteem and social capital building capacity
• What the role of volunteers and accredited (community) mentors would be
• Is there any added value to relate open, self- and peer-recognition outcomes of either those working for the CS or of those in need of support as well, with formal recognition procedures?
Structuring (Community’ s) Recognition Pathways

- Run f2f workshops and webinars with groups of hard-to-reach people, followed by mainly online personalised support, focusing on returns ensured with the deployment of self-recognition and also peer-recognition practice
- Provide with an exhaustive catalogue of formal recognition frameworks abiding to the needs of social work skills and competences
- Build a repository of “open recognition” tools and practice, accessible by all interested parties and user-developed and enriched content
- Build a network of mentors and volunteers
- Documenting impact on the communities wellbeing by presenting significant increase of use of open badges and other similar open recognition tools for self- and peer-assessment and “recognition”
- Increasing participation of the hard-to-reach people to the CS’ s programs
- Systematic and rewarding use of open recognition tools by the CS’ s staff and volunteers, in their social work
- Smooth and user-friendly correspondence with relevant formal recognition schemes and frameworks
- Launching CS “labs” in deprived urban areas across Italy and in the frame of European partnerships as well, where extended use of open recognition practice is becoming a reality, constructing a legacy of “good practice” in the field
- Enhance his (Mauro’ s) understanding and perception and eventually use of the open recognition tools and practice, with gradual deployment in the construction company as well

Bridging guidelines

Hard-to-reach people

- How can I leave a state of dissatisfaction, frustration and social misbehaviour by taking a good self-reflection exercise
- Are these (self-) open recognition tools user friendly and reliable for such a self-assessment and reflection process
- Developing certain competences to help me survive and get back in doing something interesting again

Mentor

- Get familiar with using open recognition tools, especially open badges and other digital credential tools
- Easily use repository of formal recognition frameworks relevant to social work, identifying competence development pathways for themselves and for their peers as well as the groups of hard-to-reach people

Municipality staff

- How can I assess social work competencies, for myself and other colleagues
- What types of formal recognition of competences for individuals and organizations are becoming relevant with the expansion of local community social cohesion activities

Local SME manager

- How can I increase effectiveness with recruiting people and with better supporting my clients in deprived regions, by open recognition means
- How could I make good use of employment subsidization programs, targeted to hard-to-reach people, by deploying open recognition practice in order to make better job matching for my company/organization
Leandro facilitating extended recognition networks

Leandro is an experienced staff member of a State Accreditation Agency in Greece, where he is currently responsible, as member of a joint Task Force (from Ministry Education and Ministry of Labour/Employment) with revisiting and consolidating the some-year already adopted - but limited use - NQF and further on eloquently deploy other “de-facto” “Competence Framework” standards, elaborated and consolidated by European Experts and National Representatives at the European level, with the aim to enhance labour mobility in the Greek labour market and eventually boost employment, which is at the lowest historical levels - after a 10-year economic crisis coupled with the heavy pandemic wave of short but severe business recession.

Driving considerations

- Making best use of European legacy in the field of self-assessment and formal assessment of competences to consolidate formal recognition frameworks adopted by the Greek Agency and practice deployed in order to provide flexibly regulated labour market and cater for social cohesion as well
- Investigate the extent to which open recognition practice and tools could upgrade effectiveness of the actions undertaken by the Agency and other certified stakeholders in their mandate to facilitate labour mobility and upgrade quality of human capital development services (training programs, guidance and employment support services, etc.)

Validated Recognition Pathways

- Organize and run workshops and webinars, with hands-on cases of self- and peer recognition practice and “tools”, with his Agency’s staff and affiliated experts, run presentation loops with the Agency’s management and policy-making advisers
- Run series of webinars with stakeholders and social partners, joined by experts in the fields of open recognition, digital credential and public ledger solutions
- Launch research and analysis project, with the assignment of a Task Force, for the review and consolidation of open recognition compatibilities and complementarities
- Consolidating guidelines for linking formal recognition to (informal) “open” recognition practice, to the benefit of Accreditation Agencies and Professional accreditation bodies as well as to the social inclusion providers
- Establish yearly review processes, to be run by country’s human capital accreditation bodies, social services and social partners for the elaboration of fit-to-purpose means (frameworks, tools and processes) to enhance employment boosting actions and social cohesion support programs

Bridging guidelines

State Agency staff member
Which sort of complementarities could prove useful between formal recognition practice and informal recognition one?
What kind of digital technologies and solutions are relevant?
How could we produce “good practice” in the field of action?

Competence Accreditation agencies’ staff member
Could we provide preparatory competences’ recognition means for the better preparation of professionals in the specific industry or profession?
How could we reach a set of guidelines to support human capital development and job brokering providers to enhance labour market mobility and increase employment?

Professional accreditation bodies’ staff
How could we support “competence accreditation” agencies in coming up with guidelines to enhance complementarities with informal recognition practice

Build solutions and services for the continuous familiarization of labour force and professionals with open, peer recognition practice

*Social service organizations’ staff*

Build solutions and services for the continuous familiarization of social workers and professionals with open, peer recognition practice

Provide guidance to people in need of support for their familiarization with open (informal) self- and peer recognition tools and practice, enhancing their employability and social responsibility