Paper Proceedings
SPACE Network
Conference Porto

“Equality, Equity and Efficiency in Higher Education Worldwide”

26/04/17 – 28/04/17

ISCAP Accounting and Business School
Title of the Publication:
SPACE Network Conference 2017 Paper Proceedings

Publisher
SPACE European Network for Business Studies and Languages
Ravensteingalerij 27
1000 Brussels
Belgium

Start date of publication
201705

Frequency
Annual

ISSN
2521-1129
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ABSTRACT
This work deals with the processes of mergers and acquisitions (M&A) in the educational market of higher education in Brazil, exclusively between 2005 and 2014. Such an approach is justified in relation to the large volume of this type of event related to higher education HEIs (HEIs) moving towards a process of consolidation in the industry. The purpose of this study is to establish an overview of the main M&A in Brazilian higher education educational market, typifying the size of HEIs, the geographic location and the profile of the acquired HEIs. This is demonstrated through the sample comprised 103 M&A events that occurred between the 8 largest purchasers. The analysis proved that the buyers have fondness for HEI College type, with businesses below 4000 students and with concept of General Courses Index (IGC) 3 and located in the South or Southeast of the country.

INTRODUCTION
The volume of M&A in the Brazilian higher education has particularly movement the sector. Since 2005 when the first acquisition was announced, the number of transactions involving HEIs of all Brazil has not stopped growing. This growth has promoted an intense change in the higher education sector with regard to processes of professionalization of management of these HEIs, as well as in the fierce competition for student.

This paper analyzes the volume of M&A involving Brazilian HEIs between 2005 and 2014. In this period of great transformations is possible to realize the entries of international groups acquiring national HEIs. This is interesting because, in the higher education market, the presence of these large groups had not been established before 2005. In this sense, this job interested in drawing a profile of HEIs acquired between 2005 and 2014 with regard to transaction volume, size, location and academic performance.

Although this work is concentrated in the HEIs, there were other M&A linked to basic education as well as vocational, language and free courses. It is important to note that the market has changed profoundly with these events and the trend is that these transactions has been intensified in the next years. Know the profile of the HEI acquired can assist in better understanding of the future of M&A movement in the educational sector of higher education.

M&A
According to Berkovitch and Narayanan (1993), there are three reasons for an M&A event:

1. Synergy – happens by virtue of the economic gains that may result, since the resources of both organizations will be contributing to the result;

2. Agency – suggests that the result of the acquirer management will take place at the expense of the shareholders of the acquirer;
3. Overconfidence – when there is an error of evaluation by a manager believing that the M&A is a big deal, even though they do not have all the information for decision-making.

Seth, Song and Petit (2000) consider some factors that encourage an M&A event. Are cited for them the economies of scale and scope, operational efficiency and synergy. Demonstrate there is value creation through economies of scale and scope, for operational efficiency and market power in operations made with related firms.

With high competitiveness, M&A became strategies for survival and maintenance on the market. They can minimize transaction costs, economies of scale and scope, increase in income, as well as consolidation. Camargos and Barbosa (2015) explain merger as one of the methods in which a company can acquire another and the acquisition exists when is performed the purchase of shares or assets (by means of money, stock or security). The negotiation can be performed through a private purchase offer of the administration of the target company or even a takeover bid.

Such events can be seen as an attempt to deal with the dynamism of the market. In the face of constant challenges, such a choice can make the organizations more efficient, expansion and market consolidation, integration and internationalization.

The corporate world has been practicing for some time the process or operation of M&A. Such transactions are carried out involving significant amounts in monetary terms. Many companies end up completely changing its strategy, and even control your environment.

Data show that this practice has grown in recent years in view of the large and rapid changes in technologies, economies of scale and scope, new industries and opportunities, globalization, among others. The advantages of this practice can be seen in the contribution to reduce bankruptcies, increased efficiency, more safety to investors and better efficiency. However, there is a discussion of this practice involving the issue of monopoly.

It is important to mention that in the case of horizontal M&A, the goal of the organization is to be able to compete better on the market and thus increase their presence. The vertical M&A the goal is often to reduce costs by merging of aspects that give advantage to one side to the other, as absorption of technology, logistics or purchasing costs, etc. Although this type of practice, as already mentioned, has shown growth, it presents the so-called waves, in which certain times become very heated and happen many M&A, and at other times, there is a slowdown. This happens even in certain market niches that are high and so encourages its executives to realize opportunities to seize the moment. Another aspect is to take advantage of the fall in the value of shares of a particular organization.

You can highlight in this sense some waves that occurred, as in the beginning of the last century, in which oil companies, steel and mining made several horizontal mergers. A second wave occurred from the years 20 and this was vertical, because they were companies in the client-vendor type. There is also the wave in the years 60 in organizations of various different niches or unrelated practiced M&A. The 80s present another wave, very different from what was until then known: acquiring or merging with company that had poor performance, in order to resell later. So, in this operation, sought to recover the operational capacity and make debt payment via operating cash flow. Another wave happens in 90 years in order to increase competitiveness and thus to become a globalized company. Important to remember the technological changes that have occurred as never before, especially the internet, computer networks and software. From 2004 can observe the last wave, which presents a consolidation of technology companies and the participation of companies with investment funds. There is no doubt that for a company practicing M&As, need to be sure that she will add economic value to the acquired.
Therefore, you need a synergy between them; it will be necessary to review the assets and apply them (assets of two organizations) in the best possible way. This should result in better revenue (increase), market expansion, new products, new customers and new opportunities. In addition, you can get cost reductions, with a view to the new assets.

In an M&A process, it is important that there is value creation. To this end, it is vital that there is synergy, which is when the value of the new combined firm is greater than the sum of each of the Parties observed in isolation.

This synergistic process can be observed when it improves resource utilization, for example, generating better opportunities. In addition, can be observed changes in operational processes that can result in economy.

In this way, one can understand that M&A with related companies tend to have a great synergy in relation to operational aspects.

It is concluded that M&A generate economies of scale, would increase the size of the company. This implies better use of human resources, logistics, operational. Also benefits from economies of scope in order to be able to assist the Organization to produce new goods and services with reduced cost, as these were already related to the above. However, logically, such aspects are not guaranteed for any M&A you have a deep evaluation to realize the gains that may occur and to identify the hazards and risks. A study of corporate restructuring must figure out if the disposals (divestiture) create wealth. In General, one can see that by the actions of the company. To complement, Copeland, Lemgruber and Mayers (1987) conducted a study of events in which the sample used was with cases of failures in disposals. The cumulative return for the series of announcements about the operation is approximately two times greater than the estimated on the date of the initial announcement. Thus, it can be concluded that the disposals have been instituted to create wealth. Another important issue is that although get a good margin of success because of the ads, the initial gains decrease when the sales are completed. Thus, asset transfers are crucial to create wealth.

Thus, an organization that intends to carry out a process of M&A in the international scope needs to take into account and recognize what has in technological terms, intangible assets, marketing and structure. In addition, must take into account aspects that sometimes are not as noted as the culture of the country and their market – these characteristics need to be taken into account. In addition, the political and social situation can assist in making decisions about the type of Globalization that if you want to. In line with previous articles, you can see the reason to point out that this process regularly adds value, both in the context of acquiring assets or create a new structure from scratch.

3 HEI

The DCE (2015) divides the Brazilian HEIs in public or private. Public educational HEIs are maintained by the Government in 3 formats, which are: (1) Federal, (2) State or (3) Municipal. Are financed by the State and do not charge tuition or monthly fee.

The private HEIs are administered by individuals or legal entities governed by private law, with or without profit purpose. Private HEIs without profit purpose are:

- community, including in your organization maintains the community representatives;
- confessional, that meet particular confessional and ideological orientation; and
- charities, which provide services to the population, in character to complement to the activities of the State.

With respect to the administrative aspect of the HEIs (both public and private) can be of 3 types, as DCE (2015), citing the law of Guidelines and Bases of education:
1. University: multidisciplinary academic institution. Has institutionalized and intellectual production presents minimum requirements for academic degree (one-third of masters and doctors) and faculty workload (a third in full regime). Has the autonomy to create courses and academic and administrative headquarters, to issue diplomas, attach resumes and number of slots, enter into contracts, agreements and covenants.

2. University Center: pluricurricular institution. Can have one or more areas of knowledge and shows no requirement of institutionalized research.

3. College: is considered an HEI which has no autonomy to confer titles and diplomas, being dependent on that a University that perform these records. Can be also another type of HEIs that would be an organic unit of a University. Ex.: Faculdade de Direito da Universidade Federal de Pernambuco.

3.1. BRAZILIAN HEIs’ EDUCATIONAL MARKET

According to the data of the INEP (2015), participated in the National Examination performance of students (ENADE), a total of 1,753 private HEI in 2014. Of these, 69.5% obtained 3 concept on evaluation (the concepts range from 1 to 5, 5 being the highest score). Other 14% obtained 4 concept and only 0.6% obtained 5 concept. Among those who have had reviews below the expected quality, are the remaining 16%. Thus, it is possible to notice a concentration of HEIs on track 3, with this style of organization that mostly compete with those same arguments related to quality and to acquire the minimum level required. Therefore, the market is formed by competitors that offer pretty much the same type of service that can be replaced easily.

Currently, 89.5% of private HEIs are colleges. These have a smaller feature and act with courses that are more traditional. This favors the kind of existing market, because they have a lot of similarity in the conduct of business. There is an interesting consideration in relation to the market in question:

"The neoliberal Governments – of FHC to Lula da Silva – not only kept the default dependent on higher education, but offered its deepening, as part of the bourgeois strategy to deal with the structural crisis of capitalism." (Vale, 2008)

According to the CM (2015), the current Brazilian financial-economic scenario has been gradually affected by the international crisis. This has generated an effect also in the educational market. In this way, educational groups, publicly traded or not need to rethink their strategies and consider in this sense the possibility of an M&A process. The numbers of events in this market were quite impressive, with a participation of foreign organizations, thus, educational majors: Kroton Educacional, Laureate Group, Estácio Participações, Ânima/GAEC and SER Educacional. The target of these Consolidators are the HEIs that meet the class C and D, and the motivators for this are: gain in scale, brand building and survival. Such M&A events have gained strong momentum with the creation of governmental incentives to University credit and expansion of social programs.

"This process of consolidation of the private higher education has promoted a turnaround, suffering several changes. The trend is that, although smaller in volume and speed, mergers, acquisitions and the formation of educational networks continue to set the tone to the already popular Brazilian private higher education market" (CM, 2015)

The Brazilian higher education educational market presents as a characteristic the large number of private HEIs. This can be seen by the census numbers in higher education of 2014 (INEP, 2015). According to this study, there is in Brazil a total of 2,368 HEIS, with 87.4% of these are private HEIs.
The geographical distribution of private HEIs in Brazil, according to the INEP (2015), reveals that nearly half (47.3%) are in the Southeast, and the State of São Paulo with the largest number (502 HEI). Next, the northeastern region appears with 18.6%, followed closely by the South, which owns 17.5% of the HEI. The Midwest region has 10.6% and the northern region the other 6%. Enrollment, according to the INEP (2015), also features a high concentration to the private HEIs. In 2014, 7,828,013 students were enrolled in higher education (6,486,171 in undergraduate presential and 1,341,842 in undergraduate distance), and 75% (5,867,011) of this total are of students enrolled in private HEIs. The same is true in relation to students graduating and entering. That same year, 1,027,092 students completed higher education and 3,110,848 joined HEI students. Of these, 76.4% of seniors and 82.3% of new entrants are from private HEIs. In addition, it is possible to realize that this kind of market presented an expansion from 2010 to 2014. The increasing number of entrants can prove this in this period, as shown in Figure 1. On average, an annual growth of 5% and a cumulative total of order growth of 23%. If they are isolated figures only to private HEIs, it is realized in the same period a cumulative growth of 24%, and an average growth of about 6%.

4 MATERIALS AND METHODS

This article uses the bibliographical research in the sense of location and consultation of various sources of information published. It is also characteristic of this research the General or specific data collection regarding a theme providing instrumental and analytical material to any other type of research, but also running out on herself.

In gathering information for the formulation of the study, we decided to survey secondary data M&A reports on the educational sector of higher education (CM, 2015), in addition to researches on the gates of the Ministry of education (MEC, 2016).

Figure 1 - Expansion of the number of students enrolled in HEIs between 2010 and 2014 – TOTAL and Private HEIs. Adapted INEP (2014) and INEP (2015).
5 RESULT AND DISCUSSION

As a way of highlighting the M&A in the higher education market in Brazil, will be presented separately transactions that occurred by the eight main actors in volume of negotiations in this scenario: Laureate Group, Anhanguera, Estácio, Kroton, SEB, Ser Educacional, Cruzeiro do Sul and Ânima Educação. Of these actors, just the Laureate has international origin and Anhanguera, Estacio, Ser and Anima have traded in the Brazilian stock exchange.

The Laureate took place between 2005 and 2014, 13 M&A events. Of these, 5 events have complete information about the percentage acquired and the amount paid. So, in these events, were paid about of R$1,159 billion for HEIs located in the States of the Southeast, Northeast, North and South of Brazil. This organization, in 2013, received a contribution of the International Finance Corporation of R $150 million. Such numbers can be observed in the Table1.

Table 1-M&A Laureate institution. Source: CM (2015)

<table>
<thead>
<tr>
<th>Ano</th>
<th>Adquirida</th>
<th>UF</th>
<th>% Aquisição</th>
<th>FY (R$)</th>
<th>FV Alunos (R$)</th>
<th>Alunos</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>Anhembi-Morumbi</td>
<td>SP</td>
<td>59</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2007</td>
<td>Business School São Paulo</td>
<td>SP</td>
<td>50</td>
<td>35,900,000,000.00</td>
<td>15.000,000.00</td>
<td>-</td>
</tr>
<tr>
<td>2007</td>
<td>Universidade Potiguar</td>
<td>RN</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2007</td>
<td>Faculdade dos Guararapes</td>
<td>PE</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2007</td>
<td>Faculdade Potiguar da Patinha</td>
<td>PB</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2008</td>
<td>Centro Universitário do Norte</td>
<td>AM</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2008</td>
<td>Escola Sup. de Admin, Direito e Economia</td>
<td>SP</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2010</td>
<td>Centro Universitário Henrique da Silveira</td>
<td>RJ</td>
<td>90</td>
<td>9.000.000,00</td>
<td>8.181.82</td>
<td>1.100</td>
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<tr>
<td>2010</td>
<td>Universidade Salvador</td>
<td>BA</td>
<td>100</td>
<td>100.000.000,00</td>
<td>6.622.52</td>
<td>15.100</td>
</tr>
<tr>
<td>2010</td>
<td>Centro Universitário Rítter dos Reis</td>
<td>RS</td>
<td>100</td>
<td>50.000.000,00</td>
<td>7.682.31</td>
<td>6.500</td>
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<tr>
<td>2013</td>
<td>Anhembi-Morumbi</td>
<td>SP</td>
<td>41</td>
<td>1.640.000.000,00</td>
<td>30.000</td>
<td>-</td>
</tr>
<tr>
<td>2013</td>
<td>Centro Universitário das Fac. Metrop. Unidas</td>
<td>SP</td>
<td>100</td>
<td>1.000.000.000,00</td>
<td>15.000,00</td>
<td>-</td>
</tr>
<tr>
<td>2014</td>
<td>Faculdade Ra-Grande</td>
<td>RS</td>
<td>100</td>
<td>-</td>
<td>-</td>
<td>3.000</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>55.700</td>
</tr>
</tbody>
</table>

Table 2-M&A of the institution Anhanguera. Source: CM (2015)

The Anhanguera held between 2007 and 2014, 25 M&A events. Of these, 23 events have complete information about the percentage purchased, amount paid and the number of students. According to Table 2, were paid more than R$1,718 billion for HEIs located in the States of the Southeast, South, Midwest, and Northeast. Such M&A have accumulated more than 178,000 students.
Estacio took place between 2007 and 2014, 23 M&A events. Of these, 22 events have complete information. More than R $1.034 billion were paid for HEIs located in the States of the Southeast, South, North, Northeast and the Federal District. Still, there was an international acquisition, which occurred in Paraguay. The events did more than 100000 students involved, as is evident in table 3.

<table>
<thead>
<tr>
<th>Ano</th>
<th>Adquirida</th>
<th>UF</th>
<th>% Aquisição</th>
<th>FV (R$)</th>
<th>FV Alunos (R$)</th>
<th>Alunos</th>
</tr>
</thead>
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<td>2007</td>
<td>Centro Universitário Estácio de Saude</td>
<td>RO</td>
<td>100</td>
<td>21.255.300,00</td>
<td>8.000,00</td>
<td>2.500</td>
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<tr>
<td>2008</td>
<td>Faculdade Iparalleled</td>
<td>SC</td>
<td>100</td>
<td>5.247,92</td>
<td>16.800</td>
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<td>2008</td>
<td>Faculdade Iparalleled</td>
<td>SP</td>
<td>100</td>
<td>4.472,82</td>
<td>1.365</td>
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<td>2008</td>
<td>Faculdade Iparalleled</td>
<td>PR</td>
<td>100</td>
<td>3.350,00</td>
<td>1.467</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Faculdade Brasília do Sul</td>
<td>SP</td>
<td>100</td>
<td>2.334,52</td>
<td>1.365</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Faculdade Magister</td>
<td>SP</td>
<td>100</td>
<td>4.382,80</td>
<td>1.127</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Universidade de la Integración de las Américas - UNIDA</td>
<td>Paraguai</td>
<td>100</td>
<td>2.400.000,00</td>
<td>1.102,94</td>
<td>2.176</td>
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<td>2008</td>
<td>SESAP, SESA, SISA, UENM</td>
<td>RS</td>
<td>100</td>
<td>15.100.000,00</td>
<td>1.566,23</td>
<td>9.641</td>
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<td>UNIRADIAL - FAMIC, FMSC, FMI</td>
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<td>100</td>
<td>10.228.000,00</td>
<td>5.282,64</td>
<td>5.500</td>
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<td>2008</td>
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<td>2.176</td>
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<td>2011</td>
<td>Faculdade de Natal</td>
<td>RN</td>
<td>100</td>
<td>12.500,00</td>
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<td>2011</td>
<td>Faculdade de Advocacia Brasileira de Educação e Cultura</td>
<td>RJ</td>
<td>100</td>
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<td>-</td>
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<td>2011</td>
<td>Faculdade de Excelência Educacional do RN</td>
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<td>100</td>
<td>22.000,00</td>
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<td>2012</td>
<td>Faculdade Sierra</td>
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<td>100</td>
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<td>100</td>
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<td>3.500</td>
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<td>2012</td>
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<td>5.800,00</td>
<td>915</td>
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<td>2013</td>
<td>Uniweb</td>
<td>SP</td>
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<td>615.318.088,06</td>
<td>37.800</td>
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<td>2014</td>
<td>Instituto de Estudos Superiores da Amazônia</td>
<td>PA</td>
<td>100</td>
<td>80.000,00</td>
<td>4.500</td>
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<td>2014</td>
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<td>40.000,00</td>
<td>4.800</td>
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<tr>
<td>TOTAL</td>
<td>Estácio</td>
<td></td>
<td></td>
<td>1.034.763.214,06</td>
<td>104.666</td>
<td></td>
</tr>
</tbody>
</table>

Table 3-M&A of the institution Status. Source: CM (2015)

Kroton took place between 2007 and 2012, 18 M&A events. Of these, 17 events have complete information, as organizations B and c. If observed the table 4, more than R$2,266 billion were paid for HEIs located in all regions of Brazil, with the exception of the Federal District. More than 320,000 students have been involved in these processes.

<table>
<thead>
<tr>
<th>Ano</th>
<th>Adquirida</th>
<th>UF</th>
<th>% Aquisição</th>
<th>FV (R$)</th>
<th>FV Alunos (R$)</th>
<th>Alunos</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>Instituto Universitário de Estudos e Técnicas do Sul</td>
<td>RS</td>
<td>80</td>
<td>7.164.000,00</td>
<td>3.500</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>União Cearense de Ensino Superior - CESUCES - Pitágoras</td>
<td>CE</td>
<td>100</td>
<td>2.000,00</td>
<td>3.500</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>MEEP - Pitágoras</td>
<td>PR</td>
<td>100</td>
<td>21.545,30</td>
<td>3.500</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>UFPA - Universidade Federal do Pará</td>
<td>PA</td>
<td>100</td>
<td>5.250,00</td>
<td>945</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>UFPA - Universidade Federal do Pará</td>
<td>PA</td>
<td>100</td>
<td>4.400,00</td>
<td>1.200</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>UASUL - Pitágoras</td>
<td>SC</td>
<td>100</td>
<td>22.000,00</td>
<td>3.732</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>UBSAC - Pitágoras</td>
<td>RJ</td>
<td>100</td>
<td>31.500,00</td>
<td>3.500</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Faculdade Seem</td>
<td>ES</td>
<td>100</td>
<td>15.000,00</td>
<td>2.750</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Faculdade CBTA - INED</td>
<td>PR</td>
<td>100</td>
<td>3.587,20</td>
<td>802</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>CEPED - INED</td>
<td>PR</td>
<td>100</td>
<td>400,00</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Faculdade Tenente de Freitas - Pitágoras</td>
<td>BA</td>
<td>100</td>
<td>8.200,00</td>
<td>1.600</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Estácio Universitário do Nordeste - EUNOR - Pitágoras</td>
<td>MT, AP, MA</td>
<td>100</td>
<td>23.000,00</td>
<td>42.000</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>Faculdade Atual da Amazônia</td>
<td>PA</td>
<td>100</td>
<td>31.600,00</td>
<td>5.470</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>Universidade de Teresina - Cândido Rondon</td>
<td>PI</td>
<td>100</td>
<td>510.000.000,00</td>
<td>162.000</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>Kroton</td>
<td></td>
<td></td>
<td>324.423</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 4 -M&A of Kroton Institution. Source: CM (2015)

SEB took place between 2007 and 2008, three events of M&A. This comprised more than R$108 million in the States of Bahia, Minas Gerais and Paraná and comprised more than 118,000 students, as can be seen in table 5. This organization was bought by Pearson–English company – in 2010, for more than R$900 million.
The SER Educational Organization held six M&A between 2013 and 2014. This comprised a payment of more than R$370 million and more than 30,000 students. All events took place with HEIs in the Northeast, with the exception of an acquisition that occurred in the Southeast. Table 6 shows all information about the events that occurred.

<table>
<thead>
<tr>
<th>Ano</th>
<th>Adquirida</th>
<th>UF</th>
<th>% Aquisição</th>
<th>FV (R$)</th>
<th>FV Alunos (R$)</th>
<th>Alunos</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>Faculdade Décima / Joaquim Nabuco</td>
<td>PE</td>
<td>100</td>
<td>3.380.000,00</td>
<td>5.160,31</td>
<td>655</td>
</tr>
<tr>
<td>2013</td>
<td>Faculdade Juvêncio Terra</td>
<td>BA</td>
<td>100</td>
<td>5.000.000,00</td>
<td>9.435,96</td>
<td>330</td>
</tr>
<tr>
<td>2014</td>
<td>Faculdade Ângelo Lacer</td>
<td>PE</td>
<td>100</td>
<td>2.300.000,00</td>
<td>6.000,00</td>
<td>350</td>
</tr>
<tr>
<td>2014</td>
<td>UNESPA e ISES</td>
<td>PA</td>
<td>10</td>
<td>151.200.000,00</td>
<td>12.393,44</td>
<td>12.200</td>
</tr>
<tr>
<td>2014</td>
<td>Faculdade Santa Emília</td>
<td>PE</td>
<td>100</td>
<td>9.300.000,00</td>
<td>6.466,67</td>
<td>1.500</td>
</tr>
<tr>
<td>2014</td>
<td>Universidade de Guarulhos</td>
<td>SP</td>
<td>100</td>
<td>199.080.000,00</td>
<td>10.878,00</td>
<td>18.300</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
<td>370.260.000,00</td>
<td>33.535</td>
<td></td>
</tr>
</tbody>
</table>

Table 6-M&A of BEING educational. Source: CM (2015)

The Cruzeiro do Sul held 3 M&A between 2008 and 2013 and sold 37% of your control to the ACTIS for about R$180 million. Its operations took place with HEIs of São Paulo and the Federal District. The table 7 still shows that all purchases were 100%.

<table>
<thead>
<tr>
<th>Ano</th>
<th>Adquirida</th>
<th>UF</th>
<th>% Aquisição</th>
<th>FV (R$)</th>
<th>FV Alunos (R$)</th>
<th>Alunos</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>Centro Universitário do Distrito Federal</td>
<td>DF</td>
<td>100</td>
<td>7.000</td>
<td>7.000</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>Universidade Cidade de São Paulo - UNICID</td>
<td>SP</td>
<td>100</td>
<td>15.000</td>
<td>15.000</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>Universidade de Franca - Unifran</td>
<td>SP</td>
<td>100</td>
<td>120.000.000,00</td>
<td>6.315,79</td>
<td>19.000</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
<td>120.000.000,00</td>
<td>41.000</td>
<td></td>
</tr>
</tbody>
</table>


The Ânima Group held five M&A between 2009 and 2014 and received a $100 million contribution from Investments BR in the year 2012. Of the 4 events known, were investments of R$1, 5 billion and involved more than 100,000 students. The table 8 shows two acquisitions of the same acquired in different periods.

<table>
<thead>
<tr>
<th>Ano</th>
<th>Adquirida</th>
<th>UF</th>
<th>% Aquisição</th>
<th>FV (R$)</th>
<th>FV Alunos (R$)</th>
<th>Alunos</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>Centro Universitário de Belo Horizonte - UNBHB</td>
<td>MG</td>
<td>100</td>
<td>15.000</td>
<td>15.000</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>Universidade São Judas Tadeu</td>
<td>SP</td>
<td>100</td>
<td>320.000.000,00</td>
<td>11.228,07</td>
<td>28.500</td>
</tr>
<tr>
<td>2013</td>
<td>IGBM Educação</td>
<td>SP</td>
<td>10</td>
<td>50.000.000,00</td>
<td>50.000,00</td>
<td>10.000</td>
</tr>
<tr>
<td>2014</td>
<td>IGBM Educação</td>
<td>SP</td>
<td>10</td>
<td>39.200.000,00</td>
<td>39.200,00</td>
<td>10.000</td>
</tr>
<tr>
<td>2014</td>
<td>Centro Universitário Jorge Amado e Universidade Veiga de Almeida</td>
<td>RJ, BA</td>
<td>100</td>
<td>1.140.000.000,00</td>
<td>20.542,09</td>
<td>55.619</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
<td>1.549.200.000,00</td>
<td>99.119</td>
<td></td>
</tr>
</tbody>
</table>


In the face of such data, it is possible to realize that the eight studied are buyers, focus 18% of the market among the private HEIs, which represents today, a number of more than 1 million students. Figure 2 shows the Market Share of this consolidator group.

Is notorious even the participation of groups of foreign investors who have taken advantage of the opportunity to participate in a fragmented market (76.6% of private HEIs has up to 2,000 students) and with strong investment return rates (CM, 2015).
The largest foreign investment fund was Advent Fund, which bought part of Kroton in 2010. In this same year, the European Group Pearson acquired the SEB in a transaction of over R$900 million. In 2013, the Laureate Group received $150 million contribution of the IFC. Even in 2013, there was the largest merger to date in the market – Kroton and Anhanguera have teamed up in April and became one of the largest in the world with an estimated market value of 21,287 R$ billion.

With the analysis of the information of M&A, it is possible to trace a profile of acquired. To analyze the full set of events can see, the HEIs purchase target are located with great prevalence in the State of São Paulo (representing 29% of the total). Secondly, the States of Minas Gerais, Rio Grande do Sul and Paraná (with 7% each of them) are tied. Therefore, it is a clear preference for South and Southeast regions, because they represent together 62% of the total M&A.

Another analysis to be observed is the size of the acquired HEIs. Highlights this information by typing between the organizations below 2,000 students, between 2,001 and 4,000 between 4,001 and 8,000, between 8,001 and 16,000, between 16,000 and 32,000 and over 32,000 students. The preference of the purchasers are HEIs under 2,000 students. Adding the below 4,000 students, are totaled 57% of HEIs.

In examining the question of quality influences whether or not the purchase, it is possible to conclude that the preference is for HEIs that have note 3 in General Courses Index (IGC) which is measured through the ENADE. It is still perceived that there is no effort in improving this concept by the HEIs purchasers, because in the vast majority of cases this index has not changed after the acquisition. Figure 2 shows the percentage of purchases of HEIs in accordance with its concept of IGC. It has not been possible to verify in all cases, because some HEIs, at the time of your purchase had not yet defined concept. In this way, almost 90% of the acquired have the minimum quality concept.

![Concept IGC of HEI Acquired](image)

*Figure 2: Concept IGC of HEI Acquired. Source: INEP (2015).*

Finally, it is possible to present the total volume of transactions of the eight that remained at the cottage of the Consolidators more of: R $8.3 billion.
6 FINAL CONSIDERATIONS

This job interested to know if it was possible to trace a profile of HEIs acquired before the large volume of M&A present in the Brazilian market between 2005 and 2014. It has been shown that there was a significant change in the higher education sector with the presence of Consolidators that today are about 18 percent of the market. To answer the research question, we can say that the average profile of HEI acquired in this period presents the College type, with businesses below 4000 students, with concept of IGC 3 and located in the South or Southeast of the country.

We can say that the M&A process has brought significant contributions to the educational market with regard to the increase of students, competition and professionalization of management of HEIs. This contribution, however, does not cover or reaches the qualitative aspect, because there were no significant improvements in the indices of quality of the acquired HEIs.

This work contributes to the better understanding of the profile of HEIs target of acquisition process in the higher education sector. It is suggested that acquiring HEIs may be based on this article for future acquisitions. Important to note that this study requires a greater deepening in other aspects inherent to the processes of M&A as, for example, issues related to synergy, intangible assets and internationalization processes.

REFERENCES


2 Paper: The attraction of Education: national stereotypes and study destination choice
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- Teresa Ruão (truao@ics.uminho.pt)

Keywords: Higher Education, Academic Mobility, Attractiveness, Country of Origin Effect, Country Image, National Stereotypes

ABSTRACT

This article discusses the relationship between the constructs of image, national stereotypes and attractiveness of higher education systems (HE), analysing the Portuguese case within the context of European Higher Education.

The growing importance of academic mobility (as a consequence of the globalization, political decisions and demand market) coupled with the sharp demographic decline, the increased internationalization efforts of higher education institutions (HEIs) from around the world and the general increase in global competitiveness has forced the HEI, and their own regions and countries, an increasingly strategic use of communication tools in an attempt to attract investment, resources and students to maintain and improve their position or, even, to survive.

The empirical research was based on a sample of 464 European students, from several HEI belonging to EDCOM network, from which Portuguese stereotype were measured - based on the Stereotype Content Model, (Fiske et al., 2002) and its correlation with the intention of performing all or part of a cycle of higher studies in Portugal.

The implications of this study allow to understand and as a consequence design strategies aiming to promote attractiveness of the Portuguese higher education system.

1. INTRODUCTION

The current globalized world where goods and services are exchanged with virtually no restrictions or difficulties, brought a new model followed by many changes on the production, dissemination and promotion of these products or services, both within and outside the borders of each country. In this context, a country's image and national stereotypes are extremely important and have had, over the years, an increasing leading role, since several studies show it’s significance when we are choosing and deciding to purchase and/or consume.

As most of the commercial activities, higher education also joined this trend. As a consequence, among other factors, the decreasing number of students, the reduction of financial resources, the development of new technologies, the fact that education is now seen as a product, the start of globalization, the reality of this new knowledge economy and knowledge society with a competition with just about no borders, the phenomenon of internationalization of education has become a heavily discussed topic both in the Academy and in the governments. Therefore, understanding the mechanisms of the decision making process of international students, which are the most important factors in those decisions, the weight and importance of each one of them, and what is the relationship between the consumers perception and the intention of their choice, this information is increasingly relevant to the IES, but also not only to the regions where they operate but ultimately, to their country, since the flow of foreign students is an important source of revenue, contributing, in some cases, in a very sharply way to national economies.
In this globalization era of open markets, free and shared information almost without limit, countries have become authentic brands dealing and managing their communication as well as marketing strategies just as if they were commercial companies, in order to increase the export of their products and services as well as attracting foreign investment and tourism. Working as real brands, many countries are competing with each other for their share of millions of international students seeking experience and knowledge outside of their countries. In Australia, for instance, this sector is already the second largest source of revenue, after tourism (Shanka et al., 2005).

As a result, if knowledge is universal, if it is exchanged and traded internationally crossing borders faster than people or capital, it is understandable that both institutions (that produce and promote it), and countries want to attract the best students, teachers, researchers and resources. In this context, the question of image - or perceptions / mental representations created from the stimuli communicated by brands, organizations or entities, such as cities and countries - is one of the most extremely important concepts identified by modern organizations (Ruão, 2008). Therefore, the study of the image applied to higher education in an international context is relevant as a way to help raise awareness for this issue, to study the influence of national stereotypes (in the dual role of national organizations and geographic brands) and better understand the mechanisms that generate the intention of studying in that particular country.

Moreover, literature has already stressed out the fact that by differentiating the right way you can position yourself strategically and manage (improve or maintain) the dimensions that contribute to influence stereotypes that can be key tools to change the perception of consumers, managers and investors, that no government can afford to underestimate. The authors claim that the essence of a brand’s magnetism is communication, perceived here in it’s broadest sense. That is, this symbolic exchange that generates positive or negative impressions is, in itself, a producer of magnetism, or, in other words, the engine that runs attraction. So the question here is whether they can, or if they are able to or if it is even possible to HEI and countries generate and / or control the magnet effect of their education brands through strategic communication?

2. THEORETICAL BACKGROUND

As Varghese (2008) reminds us, the sources of economic growth have changed over time: in the time of agricultural societies it was the land; after that the capital took that place during the industrialized societies and, finally, in this society of knowledge the attention is focused on the individual, their features along with capabilities. This change from industrial society to knowledge society, since the mid-century XX, brought new challenges to human communities as a whole, but especially for the individual (focused on their intellectual ability and their knowledge) that sees the growing emphasis on progress, creativity, innovation and entrepreneurship. Furthermore, since knowledge by definition is universal, it is natural that the institutions that produce and promote it have been gaining an even greater role, as they are the most visible sector of the process of creation, preservation and systematic spreading of knowledge (Kehm, 2011).

Although the universities have always attracted international students, until the 1990s what we had was an "international education", that is a set of little defragmented activities very little related between them. Since then, with globalization and the assumption of Education as a commodity (since it was included in the rules of GATS in 1995), a new reality has emerged.
In this global arena of transnational education, the analysis of the preferences of international students has become a very important subject of study, not only for HEIs involved in strategies for internationalization but also for local, regional and national authorities concerned in promoting their territories as study destinations (Cubillo et al., 2005). Indeed, there are many governments that have shown, in a very strong way, the economic benefits of higher education. This has become a global commodity, with many countries "selling themselves" as expert nations in research and education in order to strengthen their competitive position in the global arena (Stier, 2004: 91).

After all, the benefits of international student mobility go beyond the financial returns: it brings highly qualified individuals to the territory, increasing its quality, cultural level and prestige. Hence, many countries assume as a strategic objective, the development of incentives to attract foreign students to their IES. To name just one example, since 1990, United Kingdom doubled the number of international students (Binsardi and Ekwulugo, 2003), and, in the same period, Australia has tripled (Varghese, 2008).

In Portugal, the number of incoming students, by geographic regions, according to the OECD, are the following: Africa, 34.9%; Latin America, 29.5%; Europe, 28.5%; Asia 4.8%; North America, 2%; and Oceania, 0.2%. Of course the historical relationship, linguistic, cultural and even economic relation that Portugal has with many African countries and with Brazil - which is the country with the highest percentage of students sent to the country: 26.8% - explains part of this numbers. Among the European countries, the order is Spain 9.3%, France 2.7%, Italy 2.4%, UK 2.1%, Germany and Poland, 1.8% and Belgium 1.1%. As for the outgoing mobility of Portuguese students, UK leads the table (30%), followed by Spain (15.7%), France (14.5%), Germany (8, 1%), Switzerland (6.1%), Belgium (3.9%), Brazil (2.7%), and the Czech Republic and the Netherlands with 2.1% each, as the most representative destinations.

These statistics can be due to geographical proximity, social life, associated costs, knowledge, familiarity, geography, climate, or the image one has of a destination, among others, many authors recognize the location as a decisive factor when choosing the IES. Within this article, we will examine some ideals, that encompass several of these factors: the Country of Origin Effect (CoO), the country's image and the National Stereotype.

The Country of Origin Effect is explained in a very simple way, through a metaphor, by Papadopoulos and Heslop (1993): This represents for a product, the same as the profession reveals about a person who was just introduced to you at a party, i.e. we use this reference to contextualize and make upon it a judgment of value. Commonly identified by the label "made in ..." is an extrinsic clue that consumers use to assess the quality of products, whose result have implications in the attitude towards these countries and the products offered by them.

However, in a globalized world, this concept of country of origin is increasingly difficult to operationalize. Products are often designed in one country, manufactured in another and sometimes assembled in a third, so often different of the nationality of the brand (Han and Terpstra, 1988; Insch and McBride, 1999; Chao, 1993). For services, this point gains a greater importance since the intangibility requires consumers to make assumptions, so the nationality of the service providers have a greater impact on their beliefs.
As for the country’s image, Askegaard and Ger (1998: 53) define it as “a scheme or a network of interrelated elements that define a country, a structure of knowledge that summarize what we know of a country, together with its evaluative meaning or affective scheme.” Simply put, we can further define this phenomenon of mental representation as a set of mental associations - emotional and cognitive – that individuals relate to certain countries. These associations include geography, natural resources and tourist attractions; people; history; culture; language; economic and political system; social institutions; infrastructures and famous people; among others.

Differently from the traditional studies of CoO that enable researchers to analyse the consumer preferences for products from a particular country in contrast to other countries (Roth and Diamantopoulos, 2009), studies of the country’s image in the higher education environment help to explain the reasons behind these preferences. The image of the country seems to play a key role in choosing the international study destination because, in the absence of knowledge of the courses, facilities, etc., students use this formed idea to form value judgments.

Regarding the National Stereotype, Walter Lippman firstly introduced it in the social sciences with the book “Public Opinion” in 1922, where it is referred that the social representations that each individual develops about himself and others is through "images in their heads". These are images that arise in our mind when we think of certain social groups (Pereira et al., 2002), that is a cognitive scheme used in social perception when processing information on others. Basically, stereotypes are beliefs we have about the attributes, characteristics and expected behaviours of certain group members and can be explained by the principle of cognitive economy, i.e., we organize our knowledge so that we can access much information possible with minimal cognitive effort (Lima 1997: 171).

2.1 STEREOTYPE CONTENT MODEL

In all social interactions, several authors debate that people need to understand immediately: the intentions (good or bad) of the others, i.e., do they intend to harm me?, and secondly, the ability to perform those intentions, i.e., are they capable of harming me? (Fiske et al., 2002; Cuddy et al., 2008). These two core dimensions of general stereotype content, warmth and competence answer these questions.

Moreover, as Fiske et al. (2007) wrote, 82% of the perceptions of all daily social behaviours is based on these two dimensions (cited in Wojciszke et al., 1998). Therefore, when people spontaneously interpret the behaviours or develop first impressions of others, warmth and competence together largely determine how people characterize them.

The Stereotype Content Model (SCM) is a model that offers a way to look at stereotypes (Fiske et al., 2002), based on three assumptions: (a) Two-dimensional hypothesis, which puts perceptions on a map with two axes, defined by the dimensions warmth and competence, outcoming a representation in four quadrants; (b) the hypothesis of Mixed Stereotypes, which states that, in most cases, we combine the opposite of both dimensions, i.e. high warmth and low competence or vice versa; and (c) the Socio-structural hypothesis, which argues that a higher perceived level of competence corresponds a greater sense of power or status of this group, as well as a higher level of perceived competition represents a lower sense of warmth. This is the model that we used in our study.
3. STARTING QUESTION, METHODOLOGY, ANALYSIS MODEL

As a result of the presented literature review, we advocate in this study that national stereotypes generate expectations, which in turn, influence perception, social judgments and have direct influence on the attraction of a given location, as an option as a study destination. In this sense, we start with the following question:

"In what way does the stereotype of Portugal influence the attractiveness of it`s higher education system from the part of it`s European university students?"

For the study of stereotypes was used SCM model (Fiske et al., 2002). At the same time, and as a result of the literature review, the authors decided to include several other factors identified in the literature as relevant in the choice of study destination, and grouped into three broad groups - personal, social and academic - in order to realize its importance in the attraction, as well as their relationship with national stereotypes. The research scheme is shown in Fig. 1.

Fig. 1

For this study, we used a convenience sample of students belonging to EDCOM (European Institute for Commercial Communication Education), a European network of HEI exclusively from the communication field, which has 39 members from 15 European countries.

The directors of each HEI were previously contacted and informed of the framework, scope and importance of this study in the context of European academic mobility and subsequently, we sent them the digital survey to distribute among their students. We chose to collect the data electronically because it's easier to reach to all countries, it's faster plus cheaper and because it facilitates the subsequent statistical treatment. We used English because it's considered the universal language (Ha, 2009; Benzie, 2010; Wilkins and Huisman, 2011).
The survey had a first version that was tested with 50 foreign students that used to live in Lisbon (students under the Erasmus program) and afterwards was corrected some inaccuracies, redundancies and had some of the wording of the questions altered. After all inquiries were collected, they ended up having 464 as valid, which was considered sufficient as a convenience sample.

4. PRESENTATION OF RESULTS

In the Portugal’s perception analysis, and for the competence dimension (Fig. 1), the Portuguese people were evaluated in all items above the average, with scored between 3 and 4, highlighting the "confident", "skilled" and "intelligent" features with the highest scores, and "efficient", with the lowest.

![Fig. 1](image1)

On the Warmth dimension (Fig. 2), the items were scored higher then Competence, with some of the items to overcome 4 as average, such as the characteristics of "friendly" and "warm." Although all average values are above the midpoint of the measurement scale for all items, we highlight "sincere" and "reliable" characteristics as the least popular.

![Fig. 2](image2)

Regarding the perceived status (Fig. 3), the average figures are superior to "good education" perceived, where the average value is higher than the midpoint of the measuring scale. As for the items "prestige of jobs" and "economic success", the values are below the midpoint. That is, globally, European students perceive the status of the Portuguese below the average. It is our belief that the low score on the perception of economic success is linked to the economic situation that Portugal is currently undergoing, widely reported fact and known in Europe.
Regarding the level of competition (Fig. 4) that respondents perceive about Portuguese people, it is very low. This is also explained in large part by the fact that all participants belong to the same big category, Europe, hence the level of competitiveness is smaller. That is, although the nationalities are different, there is a kind of feeling of sharing common geographic territory, values, culture, among others, which creates a sense of belonging to the same group.

When self-evaluating, European students also classified all relevant characteristics about Competence, with values between 3 and 4. However, in general, the items with higher scores are "smart" and "competent" and the features which received the lowest scores are "honest" and "confident". In the Warmth dimension, the mean values also lies between 3 and 4, with all the items being scored with values greater than the midpoint of the measuring scale. Despite the very small difference between the various features, the highest scores went to the features "reliable" and "good-natured" and the least popular were "sincere", "friendly" and "warm".

Regarding the Portuguese academic factors (Fig. 5), the scores of most items are higher than the midpoint of the measuring scale, with the exception of the point concerning the "reputation of the education system."

This should deserve special attention, for three main reasons: 1. Reputation is a key factor in the selection criteria of HEIs; 2. It works as risk reduction mechanism, which in the case of international students is essential; and 3. the reputation is a set of organizational associations that take a long time to change.

The second lowest factor was "research capacity", very little above the midpoint of the scale. If we take into account that this is an area of excellence for the Academy, a factor of great weight in international rankings and a very prestige element, we easily realize its importance.
As for the best evaluated aspects, we find the "diversity of courses," followed by "quality of the teaching staff", "facilities" and "flexibility of the study format" in this order, despite having similar values.

In the self-assessment of academic factors of their own countries (Fig. 6), the European students rated all items with scores between 3 and 4, with the higher score for the "diversity of courses". In the second and third place, and in the opposite direction of Portugal, we find the "research capacity" and the "reputation of the education system."

When we look to the importance of social factors (Fig. 7) in the choice of the study destination, all ten factors have had a positive note, with the item "acquire cultural and linguistic skills" presenting a score above 4. The following items were "security", the "social life", the "costs of living" and "language". Considered less important are the "knowledge / familiarity with the country" and finally, "geographical proximity".

When we asked about the intention of studying abroad, 81% said yes, which proves that participate in a study abroad program goes far beyond the mere acquisition of knowledge or academic skills. However, 45% consider unlikely or very unlikely choose Portugal as a study destination. In our view, poor perceived quality of the Portuguese HE, is certainly one of the reasons contributing to this.
5. DISCUSSION OF RESULTS

Analysing the relationship between European students that Portugal receives and the stereotype about Portuguese people is significantly relevant. The students that Portugal receives are: Spain (9.3%); France (2.7%); Italy (2.4%); UK (2.1%); Germany and Poland (1.8%) and Belgium (1.1%). Since Italy and Poland do not have IES belonging to EDCOM, they were not included in this study. In the other four countries analysed, the values are above the midpoint of the measuring scale and with minimal differences, so we cannot conclude a direct relationship between the stereotype and the actual enrolment in Portuguese HEIs. The high number of students from Spain is directly related to the geographical proximity and, in the case of France and Germany, especially, but also the UK, with personal affinity, as a consequence of the high rates of emigration of Portuguese citizens for these countries. In fact, we are probably in the presence of students in mobility rather than international students, meaning it is possible that they are returning to their home country to study. Interestingly, UK, Spain, France, Germany and Switzerland are also the countries where Portugal sends more students with 30%, 15.7%, 14.5%, 8.1% and 6.1% respectively and, we believe, due the same reasons.

As for the academic factors, the proven correlation with the intention of studying in a particular destination, come in line with most studies, particularly the items "reputation of the education system" and "perceived academic quality." About reputation, it is still important to note that, when comparing this evaluation with the scores obtained in the evaluation of the Competence dimension, we realized that the six countries that scored higher the reputation of the Portuguese education system, four of them also scored with the highest average the dimension Competence.

As for the evaluation of the remaining Portuguese academic factors, the values follow the same pattern of the reputation: in the top half of the table we find Romania, Turkey, Bulgaria, Croatia and the Czech Republic. As for the self-assessment, Belgium, Netherlands, Switzerland, Norway and Denmark stand out as the ones that best self-evaluate, i.e., there is an exchange position with the countries mentioned above.

At the intersection of evaluation of academic factors of their own countries with the intention of studying in Portugal, we found that five of the six factors analysed, the lowest rating (1) has a direct correspondence with the highest average probability of studying in Portugal, so we can conclude that one of the factors that motivates students to study abroad, can be the lowest assessment made of the academic factors in their own countries.

As for social factors, it is surprising the un-existing correlation between the intention to study in Portugal and items such as the "acquisition of language skills and cultural" and the "geography and climate." The first factor is surprising because it contradicts all previous studies and literature review, as well as the second one, because of its contradiction to the exploratory interviews with foreign students in Portugal.

This study also revealed that on average, most European students consider themselves more competent than the Portuguese people but less affective. However, countries such as Spain, France, Bulgaria, Denmark, Turkey, Romania and Croatia evaluate the competence of the Portuguese people with higher scores than those with which they self-evaluated. Perhaps this shows an opportunity to explore in order to enhance the attraction of students from these countries.

Although when we evaluated the warmth, the evaluation of the Portuguese people is greater than the individual self-assessment of all countries, without exception. Though this dimension has a lower correlation with the intention of studying in Portugal, it was proved its existence and influence, so reinforcing this belief through communication activities will benefit Portugal’s image as a whole and also stimulate the attraction of students.
6. CONCLUSION

This research proved the existence of a positive correlation between the stereotype of the country and the intention to go there to study. In this context, one can say, as suggested by Chatallas et al. (2008), that Portuguese institutions should stimulate and enhance the image projected through the different factors that make up both constructs, in order to promote and increase the attraction of the Portuguese higher education towards international students.

Having proven the relationship between the national stereotype and the intention to study in Portugal, with the Competence dimension revealing a stronger correlation than Warmth, the Portuguese HEI, but also the national authorities, may brandish arguments that potentiate the most valued factors and try to modify the less positive perceptions.

This study also confirms the relationship between the dimension competence and the level of perceived status. Thus, it may suggest that efforts should be made to promote the status of Portuguese people, since an increased perception of this factor is directly implied in increasing the perception of competence, and this, in turn, has a strong influence on the decision of choosing the study destination.

We suggest communication supported in examples showing successful Portuguese cases, circulating more and better HEIs that arise in international rankings, articles published in newspapers and magazines of reference, research with real benefits for people, products and projects resulting from works or partnerships with Portuguese HEI, are, among many others, only a few examples that can serve as a lever to boost the perceived status of the Portuguese higher education.

Finally, we believe it would be useful to analyse the stereotype of Portugal with potential foreign students from outside Europe, since the majority of foreign students attending our HEI are from Africa, immediately after Brazil, the major "exporter" of students to Portugal. Although the language is the main reason that justifies these figures, there is a whole set of historical and cultural factors that enhances while stimulates the relationship and giving rise also to the way that the citizens of these countries see Portugal and the Portuguese people. Most of these students, contrary to the European students, come in different mobility logic - normally longer, more engaging and paid, so with greater economic benefits for the country.

Moreover, with the increasing global competition, Portugal must guard the guarantees of this flow of students, under penalty of start to losing them gradually to other geographic regions and countries. To do this, one must know well their attractiveness, realizing the weight and importance attached to each of the social and academic factors relevant in deciding the choice of study destination, and follow the evolution of perceptions of these audiences, particularly through imaging studies and evaluation of the stereotypes, and finally, developing strategic actions, also at the level of communication in order to manage and improve these perceptions.

Higher education is, like it or not, a worldwide business, where "HEIs operate and work their expressiveness through communication, in a competitive market logic and clear economistic purposes" (Ruão, 2008) and the HEI don’t have another way to survive, unless increase its capacity to attract. Attracting more resources, more investment, better teachers, better researchers, and, of course, more and better students.

Despite the decision process and choice of students be complex and multidimensional, in the case of international choice, the location factor proves to be crucial and decisive at the time of decision-making. Whether by direct relation to the costs, either by geographic proximity, social life and surrounding environment, geography and climate, either for safety or even the perceived image of the destination, the location of the campus seems to be decisive in the choice of students.
Moreover, the stereotype of the country is fundamental in this decision process. Based on the assumption, confirmed by extensive literature, that mental network of the affective and cognitive associations that individuals have about certain countries (country image) has a direct influence on the evaluation of products and services they produced, and having proven, too, that the stereotype of a country is bounding the way it is perceived and has direct influence on the relationship of intent with this country and its citizens, we argue that the study of these beliefs is therefore essential for multiple industries, as in this case, higher education.

A better understanding of how countries and their citizens are seen by foreign students will benefit, various stakeholders in this sector. Realizing better how they are perceived, different factors can devise strategies to address the less positive situations, improving the dimensions less well evaluated, and / or enhancing the most valued, making their higher education more attractive and more competitive in global market.

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3 Paper: Management Support for Staff Knowledge Sharing in Higher Education Institutions
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INTRODUCTION

This study is rooted in the complex and rapidly changing convergence of higher education, information systems, and the new wave of social media enabled knowledge management (KM). This wave is centred on the convergence of organizational applications of social media, known as enterprise social networks (ESN) and virtual communities of practice (vCoP). The research is based on an Action Research (AR) project and its main focus is to investigate how ESN can enable staff knowledge sharing in vCoP in higher education institutions (HEIs).

The implementation of KM practices in HEIs has been identified as being at low levels by a number of studies, and the consequent lack of staff knowledge sharing has a significant negative impact on the overall performance of these organizations (Cheng et al., 2009; Sohail and Daud, 2009; Mavodza and Ngulube, 2012; Fullwood et al., 2013; Al-Husseini and Elbeltagi, 2015). In contrast, knowledge sharing by staff in organizations has long been recognised as having a significant role to play in the development of the intellectual capital and the competitive advantage of those organizations (Nonaka and Takeuchi, 1995; McLure and Faraj, 2000; Wang and Wang, 2012; Bartlett and Ghoshal, 2013). The use of ESN for knowledge sharing is gaining in popularity and has been identified as beneficial to the performance and competitive advantage of organizations (Leonardi et al., 2013; Ellison et al., 2014; Friedman et al., 2014; Leftheriotis and Giannakos, 2014). Social media are computer-mediated tools that allow people to create, share or exchange information, ideas and media in virtual communities and networks (Kaplan and Haenlein, 2010), and the application of these technologies within the workplaces of organizations to facilitate work-related communication and collaboration is referred to as “enterprise social networking” by Richter and Riemer (2013). These tools can be used to support a KM technique known as communities of practice (CoP), described by Wenger and Snyder (2000) as groups of individuals linked together by their enthusiasm for sharing and expanding their knowledge, typically in informal settings and arrangements, resulting in the creation of inter and intra-organizational groups called virtual communities of practice (vCoP).

According to Dean et al. (2013), an important aspect and function of CoP is increasing organizational performance through the creation of shared identity and purpose.
Ng and Pemberton (2013) state that the concept of CoP has been extensively examined within the corporate context and can produce many benefits for both individuals and organizations, and, according to Wiig (1999), these benefits may also apply to HEIs. However, the majority of research into using CoP in HEIs has been done in the context of teaching and learning, and consequently very little is known about how CoP can benefit the wider HEI organization (Kimble et al., 2008). HEIs are rarely to the fore in the implementation of information systems for either their teaching or corporate practices and, according to Leidner and Jarvenpaa (1995), academic institutions typically lag behind businesses by about ten years in the adoption of new technologies. This is in contrast to academics themselves, who are known to be early adopters of social technologies (Eysenbach, 2011) and research community software (Lin, 2012). Given that ESN are only recently becoming commonplace in organizations, it is hardly surprising then that they have not yet gained a significant foothold in HEIs. Accordingly, there has been little research into how ESNs might be used to enable knowledge sharing in HEIs (Ortbach and Recker, 2014). The research questions examine the antecedents for a knowledge sharing environment, the dominant problems associated with staff using ESN and participating in vCoP, the key motivations for participating, and the perceived organizational and individual benefits of a vibrant knowledge sharing environment.

The conceptual model for the research identified a number of key antecedents which must be present in the organization for a knowledge sharing environment to emerge. One of these is management support, which includes the provision of funding, training, promotion and appreciation (Wenger and Snyder, 2000; Paroutis and Al Saleh, 2009; Zboralski, 2009; Wang and Noe, 2010; Mosha et al., 2015). A related antecedent is having an organizational culture that makes peer sharing of knowledge just as valid as top-down sharing (Azudin et al., 2009; Zboralski, 2009; Annabi and McGann, 2013). Many of the organizational and individual barriers to knowledge sharing stem from the presence of an organizational culture that does not promote or encourage knowledge sharing, and this is evidenced in management practices within these organizations. For example, Pei Lyn Grace (2009) identifies a lack of human resource policies and practices to support the use of social media tools for knowledge sharing as a critical problem. Riege (2005) discusses a lack of knowledge sharing strategies and highlights the lack of a connection between such strategies and the use of social media tools. This study seeks to determine if management and staff are committed to overcoming the barriers to knowledge sharing in order to realise those benefits.

The remainder of this paper presents a brief description of the research design and methodology before presenting the findings relating to management support and organizational culture. These findings are discussed before a conclusion, which includes suggestions for further research, is presented.

RESEARCH DESIGN AND METHODOLOGY

The contextual setting for the study was a HEI with 7,000 students and 600 staff, delivering a range of courses from its campuses in Ireland. The project involved the creation of a Communities Portal and the use of ESN to facilitate the establishment and operation of vCoP. The portal acts as a collection point for all of the vCoP in the organization, and allows users to see what communities are active, join communities or create new ones. The primary ESN tool behind the portal is Microsoft Yammer. Yammer is a social network that’s entirely focused on a business. It facilitates group conversation and collaboration and has many similarities to familiar social media tools such as Facebook and Twitter. The researcher is a staff member in the case organization and has held both service management and academic positions in it. The approach to this study embraces the researcher’s place within it, and fully recognizes that a priori knowledge and existing values will invariably intrude upon the observation. From this understanding, it was considered that AR would be the most appropriate research strategy to adopt for the study.
AR involves the active participation of the researcher and seeks to bring about change within the organization in which it is conducted. It is an iterative process normally constructed with a longitudinal design to allow time to examine changes as iterations of the research progress (Baum et al., 2006). According to Baskerville and Myers (2004), the goal of AR is to solve existing practical problems while generating scientific knowledge at the same time. According to Susman and Evered (1978), AR can be viewed as a cyclical process with five phases of diagnosing, action planning, action taking, evaluating and specifying learning (Figure 1). Although some of these phases may be conducted jointly, they are all necessary for a study to be truly defined as AR. The first phase, called Diagnosing, involves the identification of primary problems that are to be addressed within the host organization, and is considered to be an integral part of the research design. Before the first AR cycle begins in reality, this phase involves identifying the problem at the outset and then undertaking a review of the existing literature to help frame and develop a conceptual model for the study. This AR study consisted of three cycles running over a 12 month period. Each cycle consisted of a package of interventions designed to increase participation rates in the ESN and vCoP.

The conceptual model, shown in Figure 2, was used to focus the objective of researching this topic, and also to develop a number of research questions for empirical testing. An analysis of the literature indicates that there are low levels of staff knowledge sharing in higher education organizations. The conceptual model suggests that the implementation of an ESN in a HEI, and the promotion and support of its use in vCoP, will enable staff knowledge sharing activities, providing a number of individual and organizational benefits. The research questions were used to examine the inputs and outputs of the model in detail, and focus on the determination of the antecedents for knowledge sharing, understanding the dominant problems associated with the implementation of ESN and participation in vCoP, exploring the perceived benefits of knowledge sharing for both the organization and for staff members, and determining the key motivators for staff to adopt the use of ESN and participate in vCoP.
The primary data collection methods used during the study were focus groups for Cycle 1 and semi-structured interviews for Cycles 2 and 3. Reflective journaling was used extensively throughout the AR cycles in order to capture interpretations of the interventions for each cycle, and also to capture informal conversations, observations, and anything else to do with the project. Whilst much of the reflective journaling was used to focus the analytical lens in analysing the total data set as per Scanlan et al. (2002) and Jasper (2005), an adapted reflective analysis technique from Gibbs (1988) was used to develop interpretations of the interventions. In selecting subjects for interview, a deliberate effort was made to achieve a sample that was representative of the target population, whilst including all stakeholders at the same time. This was achieved by using a combination of stratified and purposeful sampling. The importance of the role of management was established in the conceptual model, so it was necessary to ensure that a number of senior and middle managers, both academic and non-academic, were included.

Figure 2: ESN and vCoP for Knowledge Sharing Conceptual Model
FINDINGS

Management support emerged as the most critical antecedent from the data and a summary of the related key findings are presented in Table 1. Every non-management interviewee viewed management support as being critical to the success of both the communities’ model and the use of Yammer as an organizational communications and collaboration tool. However, the importance of this was not strongly reflected by the management interviewees. Interviewee [10] cites a lack of understanding from executive management about what interdisciplinary collaboration is actually about: “Management can write in its strategy that we are going to do inter-disciplinary projects and we are going to do this and we’re going to do that - it’s my own personal belief that our executive managers don’t understand how to do that”. The role of middle management, consisting of heads of academic departments and service department managers, is seen by many as vital to enable such a culture shift in the organization. Interviewee [14] feels that “it’s at heads of department level that things either fall down or are shaped in a positive way, that they become the key link in knowledge sharing”, and interviewee [10] indicates that the uptake of ESN tools by staff will only happen if use is encouraged by their own managers rather than being imposed by an “outside service department”. Interviewee [24] reinforced this view by stating that “middle management would be a crucial layer, and the reason is, if they see the benefit of it and are genuinely supportive of it, it could work. If they don’t, I’d say it would kill it”. The management skills required to enable a knowledge sharing environment was highlighted by a number of participants, with interviewee [2] asserting that those managers that are “in that creative mind space they would see it as an opportunity, but if they are not, it could be seen as just another thing taking peoples’ attention”.

No Finding
1 The role of middle management is vital
2 Management should not attempt to formalise successful communities
3 ESN needs to be promoted by line managers rather than from outside (e.g. IT)
4 Creative managers are more likely to recognise the potential of ESN and vCoP
5 Organizational culture change has to be led from the top of the organization
6 Organizational culture change can be engendered from the bottom-up
7 Executive management can encourage and promote knowledge sharing activities
8 A lack of understanding of social media/ESN from management is a potential issue

Table 1. Key Findings for Management Support

The dichotomy between a top-down and a bottom-up approach to staff knowledge sharing activities appears quite strongly in the data, with a number of interviewees of the opinion that the cultural shift required to create a strong knowledge sharing environment must be led by management, with others believing that a hands-off approach from management is required. For example, interviewee [15] states very strongly that:

This has to come from the top. Organizational culture has to come from the top at the end of the day. It can’t be driven from the bottom. The bottom can do little things - the people can work together. The people can decide, listen we’re going to share all of this. But in terms of the overall organizational culture, they can’t make it happen.
A senior manager, interviewee [21], believes that “It could come from other places, but ultimately the culture of the organization tends to be top down and no matter how hard you try from the bottom up, if you don’t get buy-in at the top, organizational culture change tends to fail, unless it’s championed from the top”. On the other hand, interviewee [11] believes that “if it is management led then it becomes imposed. It will only work if it’s from the bottom-up and voluntary”. A number of interviewees explored a middle ground, where management can develop and foster a knowledge sharing environment within the organization through strong leadership, encouraging and promoting knowledge sharing activities such as ESN and vCoP. Interviewee [29] would like “the organization to create an environment where information and knowledge is shared freely”, and believes that “in an organization like ours, if management could communicate and encourage that message, I think it would be very positive, because there is an awful lot of goodwill there”. Interviewee [13] is of the view that a knowledge sharing space “needs to be encouraged from the top down” and “managers must say it’s actually ok for you to do this, because I think that people will be very slow to do things like that without getting permission”, and interviewee [5] thinks that “it has to involve management, both in terms of promoting it and permitting it, and expecting it and responding to it, and all those things”. The same participant believes that such a commitment to organizational culture change requires “bravery and it requires stepping outside your flock a bit, and to say this is the way we are going to operate. We are going to have this sharing and we are going to expect that people will work together”. There is some evidence of this approach bearing fruition with interviewee [21] believing that “there are now a few (communities) growing organically without needing some manager to come in and tell them you know you should do this”.

Attempts by management to gain control of communities that are viewed as successful was described as a potential problem, and any such efforts should be resisted. According to interviewee [9], “…how supportive are management of knowledge sharing? The whole point of communities of practice, I assume, is that there is no ownership. Lesson number one for me was, as this began to grow, management wanted to take ownership”, and interviewee [10] stated that “management see these as working and then they try to change them into something else. They make it a more formalized thing. Once a community gains quite a bit of traction, somebody will pull it out and use it to go after research money or something else”.

A lack of understanding from management of the benefits of social media applications in the organization also emerged as a barrier to participation, with both interviewees [11] and [13] describing a lack of understanding of the nature of social media tools by their managers as an inhibitor to their use, with interviewee [11] mentioning that “I’ve heard some comments about knowledge sharing tools being used as spying tools. It’s like, in order to be working you need to be online”. Interviewee [13] further described a fear that management would not understand why a member of staff would want to participate in a CoP that was not part of their cognitive domain:

> It could become a monitoring tool. If I engage too much, I think that it could become a difficulty, with my efforts going into something that is not necessarily my job. And that could be something that maybe other people might fear too. It wouldn’t be seen as being part of your job. I’m engaging in this when there are other things that might need to be addressed.

Interviewee [20] believes that for staff to participate, management must recognise the contribution that such participation makes to the organization as a whole, stating that:

> To do it in a regular and disciplined way - it does take a bit of effort and commitment, and you need to feel that that’s valued within the organisation as a whole, even though you will gain from it personally, but that it’s also valued as contributing to the gener.
DISCUSSION

The creation of an active and vibrant knowledge sharing environment in an organization, which is underpinned by current social media type tools, requires the consideration of a number of different elements. In the first instance, the selection and implementation of the technology is important. However, this project has shown that there are very few technical barriers to a successful ESN implementation and the data indicates that staff in general have no issues with using the technology, apart from some connotations associated with the terminology of social media and enterprise social networks discouraging some staff from doing so. The other major aspect to be considered is the organizational culture and it is in changing this culture to stimulate an active knowledge sharing environment that management has the most important role to play. Organizations need to create an open and transparent culture where employees feel empowered and have a voice, making them feel more connected and loyal to the organization. It is widely recognised in HEIs, and indeed in the wider public sector, that the organizational structures encourage the creation of silos and lead to staff isolation. The development of a common understanding of the organization’s mission and goals can be achieved by the creation of a robust social, communications and collaboration framework.

In order to achieve this and include such ambition in corporate strategies, from where it can be enacted, management must firstly understand that these issues really do exist in their organizations. Secondly, they must recognize that a cultural change that engenders an active and vibrant knowledge sharing environment has the potential to solve these issues, not only increasing staff effectiveness, morale and loyalty, but also in improving operational performance, and increasing intellectual capital and competitiveness. Although, this study has established that such an understanding, and leadership, are crucial to implementing successful knowledge sharing initiatives, the question arises: how does this understanding come about if it does not already exist? It may be argued that this understanding can be encouraged through a bottom-up approach. Any organization will have a number of people who have the personality to see knowledge as a public good and are willing to openly share and freely collaborate with colleagues. Most ESN initiatives start with an IT services department, because they are initially seen as just another IT tool. However, once such staff discover that the ESN lends itself very well to supporting vCoP, communities will begin to emerge. It is through recognizing the success of some of these communities that management begin to take notice of their activities and find out more about them.

Once this process begins, the chances of developing a successful knowledge sharing community increase dramatically. However, it is vital to find executive sponsors for this to happen. Without executive sponsors, it is likely that managers will boycott the tools, or communicate their doubts and concerns to their teams, probably arising from a lack of understanding, ultimately discouraging use. This can be as simple as finding an executive who is willing to start an online group to facilitate communication and collaboration within their own department. Having senior management participation can also help to erode the stereotype view of management held by many staff and encourage them to engage with communities and the ESN.

Fidelman (2012), refers to the change in culture as organizations becoming “social businesses”, and this requires a new strategy, which takes “time, persuasion, planning, teamwork, and measurable goals”. It is suggested that this process is quite difficult for bureaucratic and hierarchical organizations of which HEIs are typical examples. However, once the value to the organization has been recognized, a vision for a knowledge sharing enterprise and the expected outcomes needs to be provided. Following this, a community management plan should be established where the people, processes, resources and technology are provided to support the vision. Lastly, the execution of the plan requires the identification of leaders and champions within the organization who will help to promote the vision and the changes associated with it.
The execution of a strategic vision for a knowledge sharing environment requires a number of practical implementations, such as the development of human resource (HR) policies and practices which support the utilization of ESN for knowledge sharing. This requires that management make a connection between the functionality of these tools and a knowledge sharing strategy. HR themselves can also take a further role in embedding the ESN into the organization if they recognize its value in helping to onboard new staff through the provision of online peer and mentoring support, the lack of which this study has highlighted as an issue. In terms of resources, the ESN itself requires both technical support and some level of management, distinct from community management. Training resources for ESN use and CoP establishment, participation and management must also be provided and available on an ongoing basis, both in structured and online forms. Although, rewards and recognition do not present in this study as strong extrinsic motivators for staff participation, management should give some consideration to reward and recognition structures as incentives for participation, perhaps through conference and seminar attendances or simple acknowledgement schemes. An additional consideration may be to the allowance of time for staff to participate in knowledge sharing activates such as vCoP, as the findings from this study indicate that time is one of the largest individual barriers to participation.

The findings imply that middle management has the most vital role to play in the development of knowledge sharing initiatives and their attitudes and behaviour will have a direct impact on staff participation. It is suggested that managers with creative abilities are more likely to recognise the potential of ESN and vCoP and promote their use within their own departments and amongst their staff. In contrast, strictly operational managers are more likely to see the ESN as another IT tool that has to be negotiated and could potentially hinder participation through discouragement and negativity. Having an active executive sponsor can go some way towards mitigating against this situation, and increasing awareness through training and information sessions for middle managers can also help in this regard.

CONCLUSION

The findings of this study have a number of implications for how management in HEIs view and manage the knowledge sharing activities of staff within their organizations. Once they recognise that it is of benefit to the organization to establish a corporate culture of openness and transparency, where knowledge sharing happens freely through participation in vCoP which are underpinned by ESN, then they must set about implementing a strategic vision to enable that cultural change. Executive sponsors must be at the forefront of knowledge sharing initiatives and middle management must be resourced to enable their staff to participate. Although leadership plays a vitally important role, it is not leadership though mandating and instruction, but rather through facilitation and encouragement, to create a space where staff feel that they can participate without being judged negatively, and where they are intrinsically rewarded for doing so. This study was limited to a 12 month AR project which spanned just one academic year. Given the time required for the necessary change in culture and associated adoption of ESN technologies in organizations, and especially in HEIs, future research should incorporate a longer design, covering at least two full academic years. The findings from this study are generalizable to the wider higher education community, and other public and private sector organisations, and should be of interest to practitioners and researchers undertaking similar projects.
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4 Poster: Otherpreneurship: unique business models of belgian smes
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Keywords: Entrepreneurship, innovation, business models, SMEs, startups, best practices

PURPOSE OF RESEARCH

Getting insights in and best practices of business cases and/or models.

METHODOLOGY

In-depth interviews were held with 52 SMEs in different sectors via a semi-structured interview in spring 2016. Most interviews were conducted face to face, mostly with the founder or owner, only three were done via Skype (2 in the US, 1 in the Netherlands). 23 interviewees focus on a B2B market, whereas 24 of them are B2C driven and 5 have both B2B and B2C customers. Some of the respondents were student entrepreneurs.

FINDINGS

We could create an online database (website1) with 52 best practices of innovative business cases/models. Sometimes it was difficult to put our finger on the uniqueness of the case: a combination of different aspects can result in the innovativeness. Business models seem to change according to the flow of the startup. In 65% of the cases, innovation has a technological aspect. Although some of the interviewees still were startups (< 3 years), keys for success apparently are:

• to seek for lots of feedback on the business idea and to have a large personal network
• to focus on innovative services rather than on products: the former need less capital to start with
• to start with personal finance (bootstrap principle) and to go for external sources of funding after one year
• to start with a complementary team of founders

IMPLICATIONS

The best practices definitely inspire new startups, and the entrepreneurs can be seen as role models for students with entrepreneurial aspirations.

ACKNOWLEDGMENTS

This poster is based on the research and related website that was conducted by students under coaching and supervision of PhD. Karijn Bonne. See: Bonne, K., Van der Maas, B., Verheughe, J., Janssens, Y., De Clerck, A., Landsheere, S. & De Beule, G. (2016). Otherpreneurship: kwalitatief onderzoek naar traditionele-, innovatieve componenten van businessmodellen [bachelor dissertation]. Ghent: Artevelde University College.

1 http://otherpreneurship.wixsite.com/otherpreneurship
5 Paper: Which tools about marketing ROI do Belgian micro SMEs need the most?

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- Karijn Bonne (Karijn.Bonne@arteveldehs.be)

**Keywords:** Entrepreneurship and Innovation, SME, Marketing, Return on Investment, digital, local business

**ABSTRACT**

Although Small and Medium Enterprises (SMEs) make use of marketing communication solutions (e.g., leaflets, commercials, promotions, sponsoring, ...), they do not fully understand which action to choose, how to use it, who to target and how to calculate the Return on Investment (ROI) of the marketing investment. SMEs often do not have methods to measure the benefits of marketing and they often make decisions based on “gut feeling”.

Previous research (i.e., explorative interviews with experts, in-dept interviews with SMEs and a survey with B2B SMEs) revealed that micro SMEs rather need many, simple and cheap tools instead of one, comprehensive but complex tool. Hence, we developed the current survey with a focus on which hands-on tools micro SMEs need the most to guide their marketing choices and to measure their marketing ROI.

A questionnaire on such specific marketing and ROI tools was completed by N=60 Belgian SMEs. The results revealed that pre-action guidance about objectives and targets relevant to one’s industry, a roadmap for a mail campaign and a tool to calculate profit per product/service visualized within a Boston Consulting Matrix are the most preferred tools. Concerning post-action guidance, the respondents needed the most: roadmaps for digital statistics (e.g., Facebook Insights), to administer ‘learnings’ and for break-even analyses (e.g., of giveaways). In the near future, these tools will be created, tested and further fine-tuned at our Research Centre Entrepreneurship 3.0, so they can be deployed and used by Belgian SMEs.

**ACKNOWLEDGMENTS**

The paper presents research funded by the Artevelde University College, Ghent, Grants number PID000610 from the Department Research & Development. The scientific responsibility is assumed by its authors. The authors are especially indebted to Ine Rombaut, Ilse Devroe and Isabelle Stevens, who participated in the data collection prior to this survey, and to Ine Rombaut, for collaboration in the creation of the materials used for this survey (the mock-ups).
INTRODUCTION

Although SMEs make use of marketing actions like leaflets, commercials or advertorials in (regional) newspapers, radio, billboards, sponsoring, mail campaigns, social media, websites, digital advertising, promotions, ..., they do not always know who they can or cannot 'reach'. They often do not know how to use marketing actions and fear a too small Return on Investment (ROI) (UNIZO, et al., 2014). Most of them do not have a well thought marketing strategy, and if they do, many do not know how the content they want to convey to their consumers should be structured across media channels (Mediaforta, 2014). Moreover, many SMEs do not have methods to measure the costs nor the benefits of marketing, and they often make decisions based on ill-founded assumptions and “gut feeling” (Gouden Gids, 2014) (Tibau, 2014).

Large companies do measure marketing performance, as they want some “accountability” of the costs made by their marketing department. Each large company shows great interest in the financial measures of marketing performance not only because the marketing department is expensive, but also to make the right decisions and to adjust the marketing strategy accordingly (Chouliaras, Gazepis, & Kargidis, 2015).

The fact that digital marketing creates better opportunities to measure the results of marketing efforts, caused a greater pressure to make offline, or say, traditional marketing efforts also more measurable. The quest to measure ROI nowadays thus applies on the non-digital and therefore less quantifiable marketing resources too. Businesses feel the urge to use marketing as a means to support the growth of their business, and they feel the need to make any offline marketing campaign measurable too, both in cost and in return. Smaller SMEs struggle even more with marketing communication, decisions and measurements than the larger companies, because SMEs do not have the budgets, time or skills to search and evaluate their marketing campaigns thoroughly.

The general goal of our research was to create guidelines for launching and measuring marketing campaigns for SMEs. Through the research, however, it became clear that a general, comprehensive and one-fits-all guideline was not something SMEs are waiting for.

In the present paper, we first present some data obtained in our previous research, including an overview of the marketing campaigns most often used in two particular samples (Franssen, Rombaut, Devroe, & Stevens, 2016). Then, we describe the most recent survey in which we focus on specific tools to help micro SMEs in their choices and design of marketing actions and in the calculation of the impact of them.

PREVIOUS RESEARCH

Based on (a) 13 explorative interviews with experts in the field of marketing, (b) 35 qualitative interviews conducted with Belgian SMEs and (c) a quantitative survey conducted with 157 Belgian B2B SMEs, and related to the scope of the current research, we obtained some valuable insights on the use and efficiency of marketing communication campaigns or actions for SMEs.

THERE IS NO GENERAL FORMULA FOR SUCCESS ... STILL, ‘DIGITAL’ RULES

Although it became quite early clear that one-fits-all solutions or recommendations didn’t exist, and that profitable actions depend on the product, sector, target group, objective and orientation (B2B vs B2C), some valuable insights about marketing actions and strategies could be formulated:

The most used marketing actions or media were digital (mail, Facebook, website, SEO, LinkedIn, SEA, responding on social media, online advertising) and Word of Mouth (WoM).

---

2 See (Franssen, Rombaut, Devroe, & Stevens, 2016) for a more complete description.
This was not only found by means of the survey filled in by 157 SMEs (see Figure 1), but was also confirmed by the 35 SMEs who were interviewed face-to-face. Digital marketing strategies are nowadays at the core of nearly all SMEs. Nearly all had a website and were active on social media.

Online was also mentioned ‘to be omnipresent’ by the 13 marketing experts we interviewed: website, newsletters, Facebook, Instagram, Google advertising, bannering, skippable or non-skippable ads before a YouTube video, ... Online marketing tools are considered as relevant, because an organization has ownership of its content, they are fairly easy to use, and they offer metrics which can be followed/figured. In addition, content can go viral very fast, which has a beneficial impact on the brand awareness.

<table>
<thead>
<tr>
<th>Mean</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail</td>
<td>2.57</td>
</tr>
<tr>
<td>The customer as ambassador (positive word-of-mouth)</td>
<td>2.25</td>
</tr>
<tr>
<td>Networking</td>
<td>1.96</td>
</tr>
<tr>
<td>Facebook</td>
<td>1.94</td>
</tr>
<tr>
<td>Post on the website</td>
<td>1.71</td>
</tr>
<tr>
<td>SEO</td>
<td>1.61</td>
</tr>
<tr>
<td>Brainstorming with customers</td>
<td>1.48</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>1.34</td>
</tr>
<tr>
<td>SEA</td>
<td>1.32</td>
</tr>
<tr>
<td>Actively respond to negative/positive comments on social media</td>
<td>1.29</td>
</tr>
<tr>
<td>Online advertising</td>
<td>1.18</td>
</tr>
<tr>
<td>Meetings</td>
<td>1.08</td>
</tr>
<tr>
<td>Exhibitions</td>
<td>1.06</td>
</tr>
<tr>
<td>Advertising on websites</td>
<td>1.04</td>
</tr>
<tr>
<td>Presentations</td>
<td>0.97</td>
</tr>
<tr>
<td>Discounts</td>
<td>0.97</td>
</tr>
<tr>
<td>Demonstrations</td>
<td>0.97</td>
</tr>
<tr>
<td>Sponsorship of goods</td>
<td>0.94</td>
</tr>
<tr>
<td>Business events</td>
<td>0.93</td>
</tr>
<tr>
<td>Send a press release</td>
<td>0.93</td>
</tr>
<tr>
<td>Post content on fora or blogs</td>
<td>0.92</td>
</tr>
<tr>
<td>Free give aways</td>
<td>0.86</td>
</tr>
<tr>
<td>Twitter</td>
<td>0.78</td>
</tr>
<tr>
<td>Newspaper ad</td>
<td>0.73</td>
</tr>
<tr>
<td>Promotional items</td>
<td>0.72</td>
</tr>
<tr>
<td>Google</td>
<td>0.71</td>
</tr>
<tr>
<td>Seminars</td>
<td>0.69</td>
</tr>
<tr>
<td>Interviews in specific dailies</td>
<td>0.68</td>
</tr>
<tr>
<td>Charities</td>
<td>0.68</td>
</tr>
<tr>
<td>Telemarketing</td>
<td>0.64</td>
</tr>
<tr>
<td>Price penetration</td>
<td>0.63</td>
</tr>
<tr>
<td>Free trial/example</td>
<td>0.58</td>
</tr>
<tr>
<td>Inviting the press</td>
<td>0.57</td>
</tr>
<tr>
<td>Flyering</td>
<td>0.56</td>
</tr>
<tr>
<td>Testimonials</td>
<td>0.54</td>
</tr>
<tr>
<td>Youtube</td>
<td>0.54</td>
</tr>
<tr>
<td>Congres</td>
<td>0.5</td>
</tr>
<tr>
<td>Festivities</td>
<td>0.49</td>
</tr>
<tr>
<td>Loyalty program</td>
<td>0.46</td>
</tr>
<tr>
<td>Incentives</td>
<td>0.45</td>
</tr>
<tr>
<td>Billboards</td>
<td>0.4</td>
</tr>
<tr>
<td>Rebate</td>
<td>0.37</td>
</tr>
<tr>
<td>PostCard</td>
<td>0.36</td>
</tr>
<tr>
<td>Chatsessions</td>
<td>0.34</td>
</tr>
<tr>
<td>Gift Voucher</td>
<td>0.31</td>
</tr>
<tr>
<td>Experiencecentres</td>
<td>0.31</td>
</tr>
<tr>
<td>Tryouts</td>
<td>0.28</td>
</tr>
<tr>
<td>Open house</td>
<td>0.22</td>
</tr>
<tr>
<td>SMS marketing</td>
<td>0.18</td>
</tr>
<tr>
<td>Coupons</td>
<td>0.18</td>
</tr>
<tr>
<td>Radio</td>
<td>0.16</td>
</tr>
<tr>
<td>Sweepstakes</td>
<td>0.15</td>
</tr>
<tr>
<td>Brandstores</td>
<td>0.15</td>
</tr>
<tr>
<td>Festivals</td>
<td>0.15</td>
</tr>
<tr>
<td>Online games or app</td>
<td>0.1</td>
</tr>
<tr>
<td>Tv</td>
<td>0.09</td>
</tr>
<tr>
<td>Flashmobs</td>
<td>0.08</td>
</tr>
<tr>
<td>Popupstore</td>
<td>0.07</td>
</tr>
</tbody>
</table>

Figure 1: Most frequently used marketing tools or actions (0 = never, 1 = annually, 2 = quarterly, 3= monthly, 4 = weekly, 5 = daily), based on a B2B SME survey (N = 157).

BUT... DIGITAL IS NOT USED TO ITS FULL POTENTIAL

Newsletters, for example, are perceived as very useful, but creating one is perceived as time consuming and requires more communication skills than posting a fast, funny, informal message on Facebook. SMEs did not use the digital media and possibilities to its full potential. However, despite their differences in the extent and quantity of use of digital, nearly all the interviewed companies using these tools, measured their output and results to some extend i.e. by using Facebook Insights, Google Analytics or any other analyzing tool available to them. The measurability of digital and online marketing tools was perceived as a huge advantage. However, and again, not all of them used all the possibilities of it. For example: “You can learn from a particular [Mailchimp] mailing which words were clicked on and who did what. You can track your prospects all the way until you reach the last letter that they have read. But do we use that information? No!”
As many SMEs often lack knowledge and time to fully and effectively use these tools, some roadmaps would be useful. For instance, tips and tricks about how to be covered or mentioned in a blog and how to cooperate with other SMEs, using ‘affiliate marketing’, which doubles the viral speed, is recommendable. These alternatives are cheaper than paid adds and may also contribute to increase brand awareness.

CONCERNING COUPONS, VOUCHERS AND REDUCTIONS

Concerning the use of coupons, vouchers, reductions and sponsorships experts mentioned that companies should calculate the most interesting value of a voucher of coupon in advance (“is a reduction of 50 cent necessary, or would one of 30 cent be enough?”). Although SMEs can quickly calculate additional sales during coupon periods, it would be interesting for SMEs to calculate the real cost a priori, even taking into account cannibalization and margin loss. This would enable them to decide in advance whether or not to introduce the promotional action, just like larger companies do.

WHAT ABOUT “LEARNINGS”? 

Enterprises can learn a lot by actively recording or keeping track of “learnings”. Large companies make their knowledge explicit and keep track of their data, expenses, gains and statistics in a sheet or document. They create a list including past successes and failures, as well as the conditions and reasons why. SMEs also possess this kind of knowledge, but rather intuitively and tacitly and on the basis of “gut feeling”. They know for example that sponsorship feels as a waste of money, or an exhibition does not result in the expected value (i.e., turnover, new customers). They, however, do not have the money and the time to keep track of the objective data. And yet, according to the experts we interviewed, they should at least write this information down.

INTEREST IN MARKETING AND MARKETING ROI TOOLS?

The most relevant finding for the current research might however be that SMEs were interested in tools concerning marketing actions and the ROI of these actions, only if such tools were very simple, cheap, user-friendly and manageable.

In fact, based on the findings (Devroe & Franssen, 2016) (Franssen & Devroe, 2016) (Franssen, Rombaut, Devroe, & Stevens, 2016) (UNIZO, et al., 2014) that:

- the success of marketing actions depends on the product, sector, audience, objective and market orientation (B2B/B2C focus) and hence one comprehensive ROI tool, which was our initial goal of the research, wouldn’t really fit;
- smaller SMEs have less money and resources to pay attention to their marketing strategy and actions, as well as to calculate the ROI of these marketing actions;
- B2C SMEs (typically the smaller ones) have fewer resources to spend on marketing and rely more on gut feeling or goodwill;
- SMEs need as much pre-action tips and tricks about "which marketing actions are for hands", "how to prepare a marketing plan", "what effects can be expected from one or the other action", "the costs", ... as tips and tricks on "how to calculate the ROI" (post-action tips);
- most SMEs bet on digital media;
- SMEs emphasized the need for simple and inexpensive tools;
- such tools should – above all – be made available through a website or newsletter or through an adviser;
and on the opinions of some experts (Franssen, Rombaut, Devroe, & Stevens, 2016) (Rombaut, 2016)

- to assist SMEs in the preparation of a marketing strategy (e.g., target audience, ..);
- to inform SMEs about opportunities to do A/B testing;
- to teach them to keep track of data and/or “learnings”;
- to aim for smaller SMEs, even one man businesses and local business owners;
- to go wider than classical marketing (e.g., TV, radio, web), but to consider all kinds of media and marketing;

the decision was made to:

- focus on micro companies and on one man businesses or local shopkeepers;
- start with very small guidelines, roadmaps and tools, that can be incorporated and used very easily;
- develop, test and evaluate these tools within very specific kind of stores (e.g., with bakers, with butchers, with florists, with opticians, with local tailors, ...).

By such, a shift in scope happened during the project. We evolved from

- a comprehensive approach toward a very specific and action-oriented approach,
- all SMEs (i.e., B2B and B2C, smaller and larger SMEs) toward micro companies, one man businesses or local shopkeepers,
- an inclusive tool toward several, little, individual and single tools
  - about online/digital media and marketing actions (e.g., Facebook Insights)
  - about break-even calculations (e.g., break-even point of a gadget or give-away)
  - on calculations of profit per product/service
  - on the visualization of the relationship between volume and quantity sold versus profit of several products/services (e.g., within a Boston Consulting Matrix)
  - about tracking “learnings” (historical data and lessons learned)

PURPOSE CURRENT RESEARCH

In the current research, we proposed 16 marketing and marketing ROI tools/guidelines, all based on the above-mentioned insights and suggestions (see ‘Interest in marketing and marketing ROI tools?’). We had 16 such tools in mind and made a short textual and/or visual proposal/mock-up and it seemed pragmatic to us to let the audience itself decide which to develop first. In choosing our tools, we kept in mind that our students should be able to create and fine-tune these tools, albeit under the supervision of our Research and Development Center Entrepreneurship 3.0. We wanted to figure out which of our 16 proposed mini tools supporting the choice of marketing actions or the calculation of the ROI of these actions, micro SMEs were most interested in. With a small and simple questionnaire we wanted to obtain a kind of priority ranking for the tools we want to develop. These rather simple tools, roadmaps and guidelines will be developed within our Research and Development Center Entrepreneurship 3.0, with the help of students Bachelor in Business Management.

3 Based on the European classification of SMEs, micro SMEs have <= 10 staff headcounts and a turnover <= 2 m € We only included staff headcount as a variable, since it significantly correlates with turnover.

MATERIAL

Table 1 summarizes the 16 tools that were submitted to the SMEs and Figure 2 illustrates one mock-up. We submitted 3 consecutively adjusted pilot versions of the material (mock-ups and questionnaire) to 3 micro SMEs (i.e., a florist, a furniture shop and a garden center), so we could adjust the tone of voice, the mock-ups and the actual questions of our survey, in an agile way, while developing it, to obtain our final version.

<table>
<thead>
<tr>
<th>Tool Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>a guideline on objectives and targets relevant to my industry</td>
</tr>
<tr>
<td>a list of available marketing channels, pricing, contact information</td>
</tr>
<tr>
<td>a guideline how to make and interpret a Boston Consulting Matrix</td>
</tr>
<tr>
<td>a roadmap how to start and maintain a Facebook page</td>
</tr>
<tr>
<td>a roadmap how to start other social networking sites</td>
</tr>
<tr>
<td>a roadmap how to start and use mail campaigns</td>
</tr>
<tr>
<td>a roadmap how to start and maintain a website</td>
</tr>
<tr>
<td>a tool to calculate the specific profit per product/service I offers</td>
</tr>
<tr>
<td>a manual on metrics/statistics for Facebook</td>
</tr>
<tr>
<td>a manual on metrics/statistics for mail campaigns and newsletters</td>
</tr>
<tr>
<td>a manual on metrics/statistics for Google Analytics (website)</td>
</tr>
<tr>
<td>a tool for calculating break-even and ROI of free products</td>
</tr>
<tr>
<td>a tool for calculating break-even and ROI of discounts</td>
</tr>
<tr>
<td>a tool for calculating break-even and ROI of AdWords</td>
</tr>
<tr>
<td>a guideline how to track or keep learnings, how to start with A/B testing(s)</td>
</tr>
<tr>
<td>a guideline to learn to use &quot;what if analysis&quot; in Excel</td>
</tr>
</tbody>
</table>

Table 1: Summary list of the 16 tools to develop

PARTRICIPANTS

The survey was sent out digitally by means of Google Forms. She ran from March 28 to August 22, 2016. We contacted 3539 Belgian SMEs via mail, face-to-face or by messenger, asking if they wanted to complete the survey. Despite all these efforts, the survey yielded only 91 respondents. The questionnaire was started by N=91 SMEs, but only N=60 SMEs completed the questionnaire, because they satisfy the conditions to continue the survey.

Figure 2: One example of a mock-up of a tool to develop: a simplified Boston Consulting Matrix

4 The mails were obtained through the Yellow Pages Flanders and a database of the Vlerick Business School (MBA), Ghent
At the recruitment of the SMEs we emphasized on small and micro SMEs, one man businesses and local business owners, with less than 50 employees, preferably even with less than 10 employees. We also went for SMEs who sell physical goods or services to consumers or private individuals for personal use, which are extracted in a physical retail store, where sales can take place (e.g., a butcher, cafe, florist, optician, hairdresser, baker, ...). The respondent could score himself (affirmative or negative) along these criteria and went through all of the survey questions instead of only a small selection of questions. Most reports are done on this group (N=60).

RESULTS

Respondent characteristics

The SMEs who participated in the survey were mostly furniture stores, light stores, electronics stores, fishing/aquarium stores; caterers, restaurants, clothing stores, florists, bicycle dealers, wine merchants etc.

The majority of the SMEs sell mostly (55%) or only (22%) to individuals (B2C) and have only one selling point or shop (83%). Most SMEs have 1 to 5 employees (77%).

### Who's your audience?

<table>
<thead>
<tr>
<th></th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>only to companies</td>
<td>0</td>
<td>0,0</td>
</tr>
<tr>
<td>mostly to companies</td>
<td>5</td>
<td>8,3</td>
</tr>
<tr>
<td>both equally</td>
<td>9</td>
<td>15,0</td>
</tr>
<tr>
<td>mostly to individuals</td>
<td>33</td>
<td>55,0</td>
</tr>
<tr>
<td>only to individuals</td>
<td>13</td>
<td>21,7</td>
</tr>
<tr>
<td>Total</td>
<td>60</td>
<td>100</td>
</tr>
</tbody>
</table>

*Figure 3: Number and Percentage of audience of the SMEs (B2B versus B2C).*

### How many shops/selling points do you have?

<table>
<thead>
<tr>
<th></th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>no shop</td>
<td>4</td>
<td>6,7</td>
</tr>
<tr>
<td>1 shop</td>
<td>50</td>
<td>83,3</td>
</tr>
<tr>
<td>2 shops</td>
<td>2</td>
<td>3,9</td>
</tr>
<tr>
<td>3 shops</td>
<td>3</td>
<td>5,0</td>
</tr>
<tr>
<td>&gt;3 shops</td>
<td>1</td>
<td>1,7</td>
</tr>
<tr>
<td>Total</td>
<td>60</td>
<td>100</td>
</tr>
</tbody>
</table>

*Figure 4: Number and Percentage of number of shops or selling points the SMEs have.*

### How many people work in the shop(s)/business?

<table>
<thead>
<tr>
<th></th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-5</td>
<td>46</td>
<td>76,67</td>
</tr>
<tr>
<td>6-10</td>
<td>11</td>
<td>18,33</td>
</tr>
<tr>
<td>11-20</td>
<td>0</td>
<td>0,00</td>
</tr>
<tr>
<td>21-30</td>
<td>1</td>
<td>1,67</td>
</tr>
<tr>
<td>31-40</td>
<td>2</td>
<td>3,33</td>
</tr>
<tr>
<td>Total</td>
<td>60</td>
<td>100</td>
</tr>
</tbody>
</table>

*Figure 5: Number and Percentage of size of the SMEs based on number of employees.*
WHAT IS MEASURED OR MONITORED BY THE SMES, WHICH DATA CAN THEY EASILY RETRIEVE (N=91)

The respondents were asked what information/metrics could be retrieved or found by the SMEs in a rather easy and fast way, or thus, of which data are kept track of. Figure 6 shows that: turnover/revenue and number of customers per day can be found quite easily (coming from the cash desk?); the number of likes/shares/comments (on Facebook); and the number of people receiving an e-mail or to whom an email was sent are also easy findable metrics (see the top of Figure 6). The least retrievable metrics are: market share, the ROI of the incurred marketing costs, break-even points of certain sales promotions and “learnings” about successful marketing campaigns.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum score</td>
<td>5</td>
</tr>
<tr>
<td>Revenue per day</td>
<td>4.35</td>
</tr>
<tr>
<td>Number of customers per day</td>
<td>4.11</td>
</tr>
<tr>
<td>Number of likes, shares and comments</td>
<td>4.01</td>
</tr>
<tr>
<td>Adres of your customers</td>
<td>3.84</td>
</tr>
<tr>
<td>People who receive your e-mail</td>
<td>3.71</td>
</tr>
<tr>
<td>Number of visitors to your website</td>
<td>3.69</td>
</tr>
<tr>
<td>Average price per purchase in your shop</td>
<td>3.65</td>
</tr>
<tr>
<td>Number of visitors of an open house day</td>
<td>3.62</td>
</tr>
<tr>
<td>Number returned vouchers of an action (redemption)</td>
<td>3.57</td>
</tr>
<tr>
<td>Number of loyal customers who come back often</td>
<td>3.47</td>
</tr>
<tr>
<td>Net income per product / service</td>
<td>3.45</td>
</tr>
<tr>
<td>Number of distributed flyers</td>
<td>3.27</td>
</tr>
<tr>
<td>Banner / AdWords clicks</td>
<td>3.25</td>
</tr>
<tr>
<td>Number of people who open your e-mail</td>
<td>3.19</td>
</tr>
<tr>
<td>Number of new customers during a specified period</td>
<td>3.1</td>
</tr>
<tr>
<td>Number of repeated (online) purchases</td>
<td>2.92</td>
</tr>
<tr>
<td>Customer satisfaction</td>
<td>2.65</td>
</tr>
<tr>
<td>The age of your clients/customers</td>
<td>2.5</td>
</tr>
<tr>
<td>Gross Rating Points of ads (how well ads work)</td>
<td>2.21</td>
</tr>
<tr>
<td>A list of learnings, costs and benefits of actions you did in the past</td>
<td>2.12</td>
</tr>
<tr>
<td>Break-Even points of (marketing) investments you make</td>
<td>2.01</td>
</tr>
<tr>
<td>The ROI of your marketing campaigns</td>
<td>1.83</td>
</tr>
<tr>
<td>Your market share</td>
<td>1.82</td>
</tr>
</tbody>
</table>

*Figure 6: The most easy retrievable metrics and data for a SME (1 = very difficult to find these data, 2 = rather difficult, 3 = in between, 4 = rather easy, 5 = very easy), based on the entire group (N = 91).*
THE TOOLS MOST URGENT TO DEVELOP (N=60)

We offered the 16 preliminary tools (mock-ups) and asked the SMEs to answer the following question, after each separate tool. Table 2 summarises the possible forced choice answers.

<table>
<thead>
<tr>
<th>Choose the most appropriate response concerning the tool proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>

Table 2: The answers that could be chosen by the respondents, per mock-up, tool or guideline to develop

The number of SMEs who answered ‘I don’t have this (yet) and it will probably be useful’ or ‘I don’t have this (yet) and I really want this, this is what I’m waiting for’ (answers 2 or 3 on the forced choice question) could be used as an index for prioritizing the tools proposed (see purple bars in Figure 7).

The respondents apparently need the most:

- A guideline how to track or keep learnings, how to start with A/B testing(s) (N=43)
- Information on how to start a mail campaign and newsletters (N=37)
- A guideline in setting goals/objectives/targets, knowing audience, and make choices regarding marketing relevant to my industry (N=36)
- A guideline how to make and interpret Boston Consulting Matrix (N=36)
- A manual how to use metrics/statistics of a mail campaign and newsletters (N=33)
- A tool to calculate break-even and ROI of AdWords, discounts or free products (giveaways) (N=31 to 33)
- A manual how to use metrics/statistics of a Facebook page (N=32)

![Figure 7: Number of SMEs who do not have the tool yet, but who probably (‘2’) or really (‘3’) want the tool, per mock-up proposed](image)

ADDITIONAL TIPS/THOUGHTS OF THE RESPONDENTS

At the end of the survey, the respondents could fill in an open question in which we asked which tools or resources – other than those proposed by us – they could use. They indicated some concerns or tips. These comments are summarized below.
EYE-OPENER AND REFLECTIVE

“This questionnaire is an eye-opener to me. I often try things, but the effect of it is neglected and difficult ascertainable. For instance, a potential customer can subscribe to our newsletter (thanks to an action) and enroll later on a specific product, but I never measure this and these relationships.”

CHEAP AND EASY TO USE

“As a small company, it is difficult to keep up with everything. Only easily usable tools would make life/business easier.”

“An easy and free or low-cost tool in order to evaluate all in one in such a way that everything is interconnected, would be nice.”

“Create tools that do not require too much time and effort. Larger companies have staff to do such analyzes, but smaller companies don’t. Some smaller SMEs want to grow steadily, but if they feel that their intuition give them the same information as a complex analysis where they need to put in a few hours, they will drop out.”

“For people with little or no personnel it is sometimes difficult to participate in information sessions, or courses or to obtain information on certain services. If there were organizations who were more responsive to micro SMEs in offering more field guidance - in the workplace - this could have an enormous impact. E.g., a butcher stands in his atelier and his wife stands in their store. As one of the two is not there, because he/she is following a course outside, the shop is not running as it should. Seminars are certainly useful but few small businesses can take off two days for an expensive seminar.”

“We are looking for an affordable guidance in social media. We have not much resources to invest in social media though.”

ABOUT COUPONS

“The break-even analyses and the what if analyses seem to me enormously time consuming. They are undoubtedly interesting to calculate, but our intuition and subjective feeling would probably give the same result.”

REGARDING PROFIT BY PRODUCT AND BOSTON CONSULTING MATRIX

“The tool concerning a Boston Consulting Matrix and a calculation of specific profit per individual and single product would be useful in combination with stock count and it would be useful to calculate one’s range and sales results.”

“A tool to calculate margins could be very important for (government/tax) control.”

CONCLUSION AND EDUCATIONAL RELEVANCE

Basically because previous research done at our Research Centre revealed not to focus on one general and comprehensive ROI tool in which costs and benefits of marketing actions are maintained and calculated, but rather to generate several small tools and guidelines for small and micro SMEs (see Franssen et al., 2016), we proposed 16 such tools to 60 Belgian SMEs.
Both the question asked to all respondents (N=91) about which metrics are not tracked yet, or are difficult to find\(^5\) (see the bottom of Figure 6) and the questions for prioritizing the proposed tools (N=60) (see Figure 7) corroborate and lead to the same conclusions.

a) The least retrievable metrics of our respondents are: market share, the ROI of the marketing tools used, including costs and benefits; break-even points of certain sales promotions; and learnings on successful marketing campaigns.

b) The most wanted tools we proposed, are

- Information on how to start a mail campaign and newsletters
- A guideline in setting goals/objectives/targets, knowing audience, and make choices regarding marketing relevant to my industry
- A guideline how to make and interpret Boston Consulting Matrix
- A manual how to use metrics/statistics of a mail campaign and newsletters and of a Facebook page
- A guideline how to track or keep learnings, how to start with A/B testing(s)
- A tool to calculate break-even and ROI of AdWords, discounts or free products (e.g., giveaways)

Therefore, these are the tools we plan to develop—in collaboration with our students—in the near future in order to help SMEs in their marketing strategy and insights in marketing ROI.

Not only were students (Bachelor Business Management) closely involved in the research prior to the current research (see (Franssen, Rombaut, Devroe, & Stevens, 2016)) and will they be involved in the development of the tools (in spring 2017), the insights obtained in our research may be very valuable to them. The insights are fed back into their courses, and may be included into the curriculum, especially because there’s a great chance that they will be employed in a SME, since 40% of all working Belgians operate in a SME (Goetgebuer, 2015).

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\(^5\) Afterwards we realized that measuring easiness of retrieving data may generate slightly different results than measuring perceived usefulness of having those data.


Mediaforta. (2014, 03 03). Content marketing is een kans voor kmo's. Retrieved 01 03, 2015, from blog.mediafortaservices.com: http://blog.mediafortaservices.com/2014/03/content-marketing-is-een-kans-voor-kmos/


In Flanders sme-fields: from innovation insights to the innovator generator

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Keywords: SMEs, innovation triggers, innovation support, Innovator Generator, macro-environment

ABSTRACT

In Belgium, as in many other countries, governments and other organisations support enterprises in innovation activities. Despite these efforts, Belgian small and micro enterprises tend to show less innovative behaviour than larger enterprises. Moreover, research done by Vanhaverbeke (Uhasselt, 2014) revealed that small Belgian enterprises are extremely focused on their own, internal processes, thereby denying opportunities of open innovation. Picking up on new definitions, innovation is about ‘connecting the dots’, as described by David Brier (2013). Despite management tools to unlock and diffuse environmental and societal knowledge, the implementation in small and medium-sized enterprises (SMEs) proves to be non-existing for most of the small enterprises.

The purpose of the research described in this paper is to gain insights in how to inspire small enterprises (less than 50 employees) to innovative behaviour triggered by the macro-environment. Therefore we define two research questions: 1) How and by which factors are SMEs triggered in the ideation step? 2) Which tools or activities can stimulate SME managers to pick up signals of the macro-environment, instead of merely looking at the ‘in-crowd’ of their own field and competitors as an innovation catalyst?

In order to develop the research skills of business management students, two small student teams were involved in the research and tool development process.

Through case studies and in-depth interviews with SMEs insights were gained in barriers and leverages to pick up innovation impulses in SMEs. These findings were checked on a larger scale in an indicative quantitative survey. Research results showed distinctive preferences for innovation support and means of external innovation triggering. Subsequently, the user-centered tool ‘Innovator Generator’ was developed. The main objective of this tool was to capture ideas for innovation on different levels of support and through five different phases. Although this tool was developed for SMEs, it is equally interesting for students being entrepreneurs of the future. Needless to say, students as well as professionals need to be instilled with innovation skills. Students, moreover, often require 21st century innovation skills in their educational programme or when becoming a student-entrepreneur.

INTRODUCTION: INNOVATION IN FLEMISH SMALL ENTERPRISES

In Europe, SMEs encounter specific innovation problems. According to the EU, small enterprises are particular targets for innovation policy. The smaller the company, the more it faces constraints in innovation or in the commercialisation of its innovations. About 63% of companies with between 1 and 9 employees declared having introduced at least one innovation since 2011, compared to 85% of companies with 500 employees or more (European Commission, 2014).
This paper focuses on small businesses (less than 50 employees) in Belgium, and more specific in the Northern and Dutch speaking region of Flanders. Though Belgium is an innovation follower and is thus ranking relatively high in the EU Innovation Scoreboard, there is a lack of entrepreneurship and dynamics (European Commission, 2014, p. 1). This becomes even more apparent in SMEs where the term ‘innovation poverty’ adequately describes the situation. According to the Flemish Regional Indicators, only 56 % of Flemish enterprises are innovative. Larger companies and industrial enterprises perform better in innovation scores than SMEs (VRIND, 2014).

Innovation is defined in many different ways. In our research, government’s view on innovation is important, as this serves as a guideline for innovation support and subsidies. Flemish government focusses on the process and development of new products (Vlaamse overheid, 2016), whereas Finnish government stresses on cooperation, networking and more well being for society (Finish government, 2016). In recent years, innovation is also defined as a type of behaviour where connection with others leads to innovation (Brier, 2013; Baughan, 2016). This latter definition is useful in this research, as unlocking and diffusing environmental and societal knowledge is rarely executed by Flemish SMEs. Especially SMEs facing cash flow problems seldom monitor which external opportunities could lever their business, although this input across traditional borders and activities is important for the development of new products or processes. Sleuwaegen and Boiardi (2014) mention creative industries and arts as a very useful partner for innovation. Tidd and Bessant (2009) describe an innovation management process as a process that comprises different phases. In the first stage, firms need to be able to scan and search for their internal and external environments to detect potential innovation signals. This first step of monitoring and gathering ideas is the basis for further stages such as selection of potential innovation projects, providing resources and implementation. Several authors (Koops, 2009; Van Ormondt & Der Voort, 2011) mention external challenges and knowledge as a factor for innovation. Some authors, like Paul Iske (Cited in: Koops, 2009) presume innovation can only be stimulated in a situation in which entrepreneurs must, will, can, dare and may innovate. Earlier research has shown that small Belgian enterprises are extremely focused on their proper internal processes and are thus denying opportunities offered by a more open view towards innovation (Vanhaverbeke & Vanderzande, 2014). It seems that monitoring both the issue arena (Luoma-Aho & Vos, 2010) and DEPEST-analysis are not embedded in the daily routines of Flemish small enterprises.

Especially in the macro-environment, uncontrollable external factors influence the SME’s existence. The classic PESTLED-model to analyse the demographical, economic, political, ecological, social and technological facts and trends having an impact on an organization’s present and future modality, is still very valuable (Allaert & De Klerck, 1998). As this external view is nowadays underused as an innovation trigger, this research project focuses on the stage prior to the actual innovation process.

2 ADAPTIVE ORGANISATIONS AND ADOPTIVE CAPACITIES

Aalbers and de Valk (2013) describe those organisations that embrace the open innovation principle (Chesbrough, 2003, 2006) and use knowledge flows from outside the organisation as adaptive organisations. Those organisations able to implement open innovation into the normal organisation process perform better in innovation and client involvement. The main issue is to find a proper way to define and frame ideas and knowledge provided by external actors towards the internal innovation process (Vanhaverbeke, 2006). Gommer (2004) advises to map relevant trends by communicating with frontrunners in order to not just know the externals of it, but to understand the underlying implication as well. Leadbeater (2010) encourages conversation with users of different feather as the difference in ideas and viewpoint enriches the ground for innovation.
Adaptive organisations as described by Aalbers and de Valk strongly relate to the term ‘absorptive capacity’. Absorptive capacities can be described as the ability of firms to recognize, assimilate and apply new knowledge for the benefit of their business performance. These are key elements to a firm’s ability to innovate. The nature of the concept involves three basic capacities in relation to new knowledge: recognition of its value, its assimilation and its application for commercial purposes (Innovation Policy Platform, 2015). As Chesbrough (2010) suggests, open innovation poses particular challenges for SMEs because of their relative lack of capacity to both seek and absorb external knowledge. Also Roper and Dundas (2015) found evidence from research of innovation in small and medium enterprises emphasizing the importance of external knowledge in contributing to firms’ innovation success (Vahter, Love & Roper, 2013). This emphasizes the role of absorptive capacity and firms’ capabilities of integrating external and internal knowledge in successful innovation (Roper & Dundas, 2015).

In addition to the concept of absorptive abilities, the term ‘connecting capacity’ can be added. Connecting capacity involves not only the competences to seek and absorb external knowledge, but also to cross-connect this knowledge. These ‘extra company zone’ links can be the start of a new innovation or innovation process.

3. INNOVATION TOOLS

Various European players offer a wide variety of innovation tools for SMEs. The European Commission (eg. the Eco-Innovation Observatory and the Interreg V Programme on Innovation & Research), cross-border innovation platforms (eg. OECD), national and governmental organisations as well as private organisations have created, tested and implemented innovation tools and other methods to help SMEs face the DEPEST and additional innovation challenges. The tools and strategies are varied: workshops, bootcamps, consultancy sessions, fact-finding tours, network sessions, idea pitch assessments, financial guidance, online toolboxes and many more. Best practices can be found in the innovation leading Scandinavian countries (eg. the Innovation Centre Denmark) and in innovation follower Britain (Innovate UK).

4. METHODOLOGY

4.1 DEFINITION OF INNOVATION AND INNOVATION STYLES

In this research, we regard innovation as a type of behaviour. Innovation is about connecting the dots, as described by David Brier (2013) and Kevin Baughan (2016). One shows innovative behaviour when not only ‘the dots’ but also the lines are detected. True innovators are good at connecting these lines and see opportunities and links others had not observed. While making new connections, a certain ‘unexpectedness’ and extra value are created. The new connection is appreciated and regarded as new by the user or target group. In short, innovation is the detection and linking of aspects overlooked by others. This behaviour can be a starting point for an innovation management process.

In this research, William Miller’s approach on different innovation profiles is very useful. Miller defines four distinctive styles of innovation: the modifying, experimenting, exploring and visioning style. Each style has a set of typical expressions, attributes and innovation preferences (Miller, 2015).
4.2 EXPLORATIVE IN-DEPTH INTERVIEWS WITH DIVERSE STAKEHOLDERS: MANAGERS OF INNOVATIVE SMES AND GOVERNMENT EXPERTS

In this first explorative phase, managers of ten innovative Flemish small businesses (<50 employees) were interviewed by means of face-to-face in-depth interviews between September and December 2015. Four branches were chosen for this study: chemistry, textile, retail and social economy. These sectors are chosen for different reasons. Firstly, the chemical sector is seen as the most innovative branch in Flanders. Secondly, the textile industry struggled for many years in the region of Flanders, but now seems to revive due to more innovations. Social economy seemed relevant as this is a growing sector in Flanders. And finally, retail in Flanders is going through a distressing period as the sector is facing fierce competition.

The main research goal was to identify common characteristics linked with innovative behaviour and both external and internal innovation impetus and barriers of successful innovative SMEs.

Participants were recruited via the branch organisations that proposed the most successful innovative SMEs in their branch, according to Brier’s ‘connecting the dots’ view on innovation. Interviews were face-to-face and at the SMEs workplace. The researchers used a semi-structured guide, which was adapted after each three interviews to gather more or deeper insights in certain topics.

To get a closer look into existing government support, face-to-face expert interviews were carried out with the responsible persons of the Flemish governmental innovation centre and the Flemish centre for SMEs in need.

4.3 INDICATIVE QUANTITATIVE SURVEY ON SME’S INNOVATION BEHAVIOUR AND IMPETUS

A larger-scale indicative quantitative survey was conducted to validate or assess the first insights, especially preliminary assimilations concerning the environmental sensitivity of SME managers. In addition to the explorative interviews, more insights in the innovation profile of the respondents, ideation triggers, innovation support preference, and the actual network are searched for by the survey. Based on the NACEBEL-codes, a random sample of SMEs in the chosen branches was selected. SMEs were contacted via mail and an extra call for participation was launched via the websites of umbrella organisations. The online survey took place between February and May 2016. The respondents consisted of managers of SME’s in the Northern region of Belgian (i.e. Flanders), active in the retail, textile and chemical industry. The total number of these SME’s amounts to 53 490 enterprises, with retail being the largest sector with more than 50 000 SME’s.

In total, 264 respondents participated in the survey. After data cleansing 215 respondents remained. 134 respondents (62%) operate in retail industry, followed by 61 (28%) active in textile industry and 20 respondents (9%) in the chemical industry. The survey consisted of 38 questions, most of them closed. Some topics such as support needs were asked for in open questions. The collected data were analysed anonymously by means of SPSS.

Although this survey is not representative for all Flemish SME’s, it provides indicative results on innovation behaviour, innovation triggers and innovation support preference.

4.4 TOOLKIT DEVELOPMENT AND TESTING

Finally, a toolkit has been designed based on this research’s insights. The testing and adjustment of the tool is still ongoing.
5 RESEARCH RESULTS

5.1 FINDINGS FROM IN-DEPTH INTERVIEWS WITH INNOVATIVE FLEMISH SME

According to these innovative small businesses, they have the capacity to absorb new information effortlessly. Gathering new ideas for business is mainly by travelling and by having an open view on the world. Innovative SME’s seem to encounter no obstacles when being their own ‘boundary spanner’: they combine the ability to run their business while correlating with the outside world. Desk research has shown a large variety in innovation tools. Yet, the ten in-depth interviews have preliminary confirmed that innovation is a type of behaviour. Managers of innovative SME’s stated in the face-to-face interviews that tools, no matter how accessible, are not applied by innovation-driven managerial profiles. Connecting the dots is rather based on managerial behavioural aspects like perseverance, bravery, obstinacy, the ambition to fight against the tide, trendsetting attitude and being open-minded. Consequently, it was also stated that managers who are not inclined to innovate or who do not give credence to innovation, will never be stimulated to take up any innovation tool, no matter how accessible this tool or method might be.

In the in-depth interviews, managers of innovative Flemish SME’s mentioned external innovation triggers such as the sense of urgency due to new legislation, the need to differentiate from competitors, insights from trend watchers, innovative ideas in other fields, demands of clients, the administrative work load, conversations within formal or informal networks, a job or study experience in other countries, and artists and travel experiences. Internal triggers were mainly related to the personality of the business manager. Interviewees claim they are driven, eager, dedicated, competent and opinion leaders. Cash overflow was also mentioned by one of the managers as an innovation impetus.

Our respondents did not always agree with Iske’s boundary conditions. The 'must' presumption was often denied by innovative entrepreneurs as the sense of urgency, commonly considered as an innovation trigger, was not always considered to be an issue. Other respondents confirmed that at least one of these presumptions had been present and influenced the innovation process.

Besides innovation triggers, managers also mentioned barriers. The answers generally reflect their perception of doing business in the region of Flanders. The most important external barriers are the administrative burden and legislation, the high cost of social security and the feeling that Flanders is a risk-avoiding society. Interviewees also mentioned the Flemish educational school system as a problem, as it is decidedly theory-based.

Internal innovation barriers are financial risk and uncertainty, as is the anxiety the innovation might cause among the employees.

Innovative business managers think lowly of non-innovative enterprises. According to our respondents, fear is the main reason why some SMEs perform poorly with regard to innovation. Innovative business managers consider themselves courageous and brave enough to encounter unforeseen circumstances and unknown future scenarios. The non-innovators are rather seen as 'cowardice'.

Government support for innovation is demand-driven in Flanders: only those companies who are actively seeking guidance or partnerships are supported (Goeman & Rutten, personal communication, 2015, December 14).
5.2 INDICATIVE QUANTITATIVE SURVEY ON INNOVATION BEHAVIOUR OF FLEMISH SMES IN RETAIL, TEXTILE AND THE CHEMICAL SECTOR

5.2.1 DISCREPANCY BETWEEN SELF-DECLARED AND TRUE INNOVATORS

The research revealed a strong discrepancy in the way SMEs observe themselves as innovators and their genuine innovative behaviour. 57% of the Flemish SMEs in our survey claim to be innovative as described by Briers. These respondents are called ‘self-declared innovators’. Subsequently, they were asked to give an example substantiating their answer. After cleansing these answers, only 13% of all respondents can be considered as true innovators as compared to the ‘connecting the dots’ view on innovation. Answers such as: “I currently use gift vouchers” or “We shot a company movie” were not considered as proof of innovation. It therefore becomes clear that managers of SMEs overrate their innovative behaviour. Those who overrate themselves are considered as ‘false innovators’. Self-declared innovators contain both true and false innovators.

5.2.2 WEAK USE OF THE MACRO-ENVIRONMENT AS AN INNOVATION TRIGGER

Self-declared innovators gain inspiration by macro-environmental factors, although some factors are more inspiring than others. Respondents get most inspired by economic (65%), technological (61%) and social factors (51%). There is no significant difference between ‘false’ and ‘true’ innovators.

5.2.3 CORRELATIONS BETWEEN MACRO-ENVIRONMENTAL INNOVATION TRIGGERS AND OTHER INNOVATION SOURCES

The research reveals correlations between macro-environmental factors and other innovation inspirers.

Social factors as an innovation trigger correlate positively with friends & family (ρ=0.213, p=0.019); literature (p = 0.307, p = 0.001), media (p= 0.269, p = 0.003), travel (p = 0.328, p = 0.000) and demographic factors (p= 0.230, p =0.011) as innovation sources.

Positive correlations are found between technological factors as an innovation trigger and innovation sources like knowledge institutions (ρ=0.243, p=0.007), literature (p=0.315, p=0.000), network events (p=0.209, p= 0.021) and demographic factors (p=0.188, p=0.038).

There is a negative correlation between ecological factors as an innovation trigger and media as an innovation source (ρ = -0.205, p = 0.024). On the other hand, we see a positive correlation with seminars (ρ=0.179, p = 0.049).

Demography as an innovation stimulus correlates positively with competitors as an innovation source (ρ= 0.193, p = 0.033), literature (ρ=0.238, p =0.008), media (ρ=0.295, p = 0.001), social factors (ρ=0.230, p = 0.011) and technology (ρ = 0.188, p = 0.038).

No correlations were found between political/legal and economic factors and other innovation sources.

5.2.4 USE OF EXISTING INNOVATION SUPPORT IN FLEMISH SME

External support for innovation is used by 53% of the self-declared innovators. Those who use most means of innovation support mostly mention workshops (44.6%) and literature (20%). The research results show that existing innovation toolkits are not well known. The tool used most commonly is the Business Model Canvas, but even this method has only been used by 2.5% of the 122 self-declared innovators. The few respondents using toolkits are generally rather satisfied about the toolkit.
Flemish government provides support through the Agency for Innovation and Entrepreneurship, but only 19.7% of the 122 self-declared innovators have been cooperating with this agency. Also the Flanders District of Creativity, another government-supported organisation, is only used by 9.0% of these group.

5.2.5 RELATION BETWEEN INNOVATION STYLES AND ATTITUDE AND PREFERRED INNOVATION TRIGGER

To define triggers and different views on innovation, a full description of Miller’s four innovation styles were presented to the self-declared innovators among the respondents.

The first innovation style is the ‘modifying’ style. Three quarters of the Flemish SME’s (75%) in the textile, chemical and retail industry agree they correspond to this type of innovation style. More than one answer was possible in the survey. There are significant positive correlations (p < 0.005) between acknowledging this innovation style and several expressions on innovation. All of these are proof of a lack of knowledge, missing the right mentality to innovate, fear of disruption of the company’s structure and fear of risks.

There is a clear negative correlation with travelling as an innovation trigger (ρ=0.236, p=0.009). No significant correlation with a preferred innovation support method or organisation was detected.

A second style is the ‘experimenting innovation style’. 85% of the self-declared innovators agree they correspond to this type of innovators. Positive significant correlations are seen (p < 0.005) between this style of innovation and expressions that show confidence in their innovation and ideation skills. They lack fear of disruption. Experimenting innovators tend to believe more that innovation is easy (ρ=-0.176, p=0.01). There is also a positive correlation between this style and the preference for a company-tailored training (ρ=0.249, p=0.016).

Only 23% of self-declared innovators see themselves as exploring innovators. These respondents are more than others likely to realize the importance of innovation. They are more likely to know how to start innovation, have ideas and have the proper mentality to innovate. Exploring innovators tend to rely more than others on knowledge institutions (ρ=-0.371 p=0.000), travel (ρ=-0.208, p=0.022) and seminars (ρ=-0.208, p=0.022) as innovation triggers. Respondents with this innovation style clearly express what kind of support could be helpful in an innovation process. Firstly, they tend to wish a road map to start to innovate step by step (ρ=0.316, p=0.002). Secondly, they are more likely than other styles to prefer specialised and paying methods (ρ=0.277, p=0.007). Thirdly, there is a positive correlation between this exploring style and a demand for subsidies (ρ=0.262, p=0.011).

The fourth and last innovation style is the visioning innovation style. Of the self-declared innovative respondents 85% agrees with this innovation style. Research results show a significant positive correlation between this innovation style and expressions as “Innovation yields enough” and “We have the right mentality to innovate”. There is a significant positive correlation between the visioning innovation style and the preference for social factors as an innovation trigger (ρ=-0.216 p=0.017).

No significant difference between the kind of style and the branch was detected.
6 INNOVATOR GENERATOR: A TOOL TO IGNITE INNOVATION

Based on the above mentioned research results, the tool Innovator Generator was designed to help small and medium enterprises to find impulses that can ignite innovation. It enables SMEs to capture business and non-business related material in their environment and connect its factors from different angles. As SME prefer different innovation sources and factors as innovation triggers, it offers a multiple entry. A whole range of ideation-stimulating activities is proposed from different views. This suits to different profiles with a range of innovation trigger-preferences. The main goal of this tool is to ignite SME’s absorptive and connecting capacities.

The Innovator Generator method consists of three layers and five phases. The layers show the level of independence the SME can operate in for each phase. In an online environment, each step is explained and there is an immediate call to action related to each proposed activity.

The five phases show the different steps of ‘impulse capturing’ to inspire innovation. It appeals to the actions of seeing, knowing, experiencing, connecting and growing. For each of these actions, three ideation-stimulating activities are offered to the toolkit-user. According to their level of independence, users can choose an activity on a startup, intermediate or expert level. The toolkit contains a brief instruction for each activity, such as organizing a think-a-ton, implementing a 15% rule or stimulating boundary spanning in the company.

Although the toolkit is meant for SMEs, it can be very useful for student-entrepreneurs or start-ups. It takes a cross-disciplinary and multiple-entry route to appropriate tools and activities to ignite innovation. It forces students or entrepreneurs to be aware of context. The teacher or consultant’s role is that of a guide or facilitator, as he or she guides the users through the thinking process.

![Figure 1: Innovator Generator tool](image)
In the future, the tool can be made public via education and knowledge institutions, branch organizations, government institutions, seminars and business meetings.

7 CONCLUSION

Research results show that Flemish SMEs are still facing major challenges in terms of monitoring external factors as an innovation trigger. More than half of the Belgian enterprises do not innovate at all, and small enterprises are even subject to more inferior results. Governmental innovation support is demand-driven and hence aimed at the 'stronger' and more innovative enterprises. Interviews with innovative small enterprises reveal a very open view towards the world, especially by travelling and intensive networking activities. Managerial behavioral aspects are dominant key factors to connect the dots. The online survey results show that SMEs strongly overrate their innovative behavior: only 13% of SMEs in this study can be defined as ‘true’ innovators. Most respondents prefer incremental innovation, while less than a quarter are willing to take risks and prefer disruptive innovation in new fields. Innovation support and triggering preferences vary according to a.o. the innovation style of SMEs. Hence, a toolkit that meets the distinctive support needs and triggers innovation while connecting with external factors was developed. The toolkit focuses on the phase before innovation starts and is meant to capture ideas in the outside world, out of the company’s comfort zone. The testing and adjustment of this toolkit is still ongoing.

REFERENCES


ABSTRACT

Students’ engagement in academic courses leads to better learning outcomes. Students’ engagement can be successful only when students themselves consider it important. This paper presents research conducted in the Marketing Division of a Greek Higher Education Institute after its first year of function. The sample consisted of 34 students enrolled in the Marketing Division. The objectives of interest of the paper were the perceived importance of students’ engagement schemes, self-reported learning outcomes based on those, students’ evaluation and lastly satisfaction of course engagement schemes offered in the Marketing Division. Students and professors collaborated in order to improve the educational process in the Marketing Division based upon the aforementioned results. The conclusions of this study are crucial to the academic staff to find ways to engage students in courses and improve learning outcomes. Significant practical implications are discussed in the paper.

1 INTRODUCTION

The severe economic crisis that Greece has been facing since the end of 2009 has had a strong influence on the lives of the vast majority of the population. Public spending was restricted and people experienced cuts in wages, benefits, and pensions (Stavrianea and Siomkos 2016), with dramatic consequences for the Greek economy and society (Priporas et al. 2015). For example, the unemployment rate rose from 9.4 % in 2009 to 23.4% in June 2016, being the highest in the European Union for continuous years. Moreover, during the same month, the unemployment rate concerning young people under the age of 25 was 47.7% (Eurostat, 2016). Mouza (2015) found that the economic crisis resulted in undergraduate students developing high levels of stress. Students’ stress links to poor academic performance, as Stallman (2010) states. Additionally, Lacour and Tissington (2011) highlighted a direct connection between academic performance and poverty with the latter affecting the former negatively. To make matters worse, the International Monetary Fund (2016, p.13) states in its report that things will get better for Greece in 2040 when the unemployment rate will fall to about 12%, same as before the austerity measures.

The worldwide economic crisis caused job losses and severe decrease in households’ income. This, in turn, resulted in the increased offer of labor in all levels of economy. It also brought about increased knowledge competition. Thus, providing job opportunities for those having general and / or specific knowledge, theoretical and / or practical knowledge, as well as, the skills required for the job (Varghese 2009).
The aim of Higher Education Institutes (HEIs) is to provide general, specific, and/or skill orientated knowledge (Tynjälä 1999). Today, HEIs can achieve their objectives through their offered courses. They also prepare their students in order for them to become well trained professionals, thus being able to cope with potential problems that might occur in real-time work conditions (Segers et al. 2006). For this to be accomplished, student engagement in the learning process is vital. As Mann (2001) states, “Salmon (1989) argues for the need to engage the learner’s personal stance in the learning process in order to enable them to take on the role of active agent in society.” For the above reasons, student engagement in courses is a precondition for a positive learning outcome and students’ success (Kuh 2001). Students engagement in courses offered by the university is recognized as a better predictor of learning (Brint et al. 2008; Caulfield 2010), which is one of the ultimate goals of university professors (Bryson and Hand 2007). Therefore, course environments that increase student engagement will result in improved student learning outcomes (Caulfield 2010).

2 STUDENT ENGAGEMENT

There is a fair amount of previous research relating to HEI students’ engagement and learning outcomes. Specifically, previous research provides positive correlation between engagement and learning results (e.g. Pike 2003; Carini et al. 2006; Strayhorn 2008; Pike et al. 2009; Strydom et al. 2010). Additionally, research gives the significance of promoting the principles of good practice in graduate student engagement from HEIs (e.g. Koljatic and Kuh 2001; Krause 2005; Pontius and Harper 2006; Kezar and Kinzie 2006). There are many definitions of student engagement in a university setting. Student engagement goes back to Astin’s work in 1984, from which the foundations for the notion of engagement arose. Astin (1984, p.517) defined “Student involvement refers to the amount of physical and psychological energy that the student devotes to the academic experience.” Later, Astin (1985) asserted that students learn by being involved. Stepping upon this work, Kuh (2001, 2005) considered the notion of student engagement as a reciprocal relationship between the students and the educational institution that they study at.

Regarding the definition of engagement, some authors consider it as students’ concern. An obvious example is Krause (2005), whose interpretation points out that “Engagement refers to the time, energy and resources students devote to activities designed to enhance learning at university.” Thus, Krause (2005) perceives course engagement as responsibility only as far as students are concerned. Other authors consider engagement an interrelationship between students and HEIs (e.g. Kuh, 2001, 2005, 2009; Trowler 2010). Kuh (2009) states that “Student engagement represents the time and effort students devote to activities that are empirically linked to desired outcomes of college and what institutions do to induce students to participate in these activities.” In addition, Trowler (2010, p.3) defines “Student engagement is concerned with the interaction between the time, effort and other relevant resources invested by both students and their institutions intended to optimize the student experience and enhance the learning outcomes and development of students and the performance and reputation of the institution.” Finally, there are researchers who believe that there is interdependence between engagement and involvement (e.g. Skinner and Belmont 1993; AUSSE 2011). Skinner and Belmont (1993) refer that students who are engaged “show sustained behavioral involvement in learning activities accompanied by positive emotional tone.” Additionally, the Australian Council for Educational Research (ACER, 2017) state that “Student engagement is defined as students’ involvement in activities and conditions that are linked with high-quality learning ... While students are seen to be responsible for constructing their own knowledge, learning is also seen to depend on institutions and staff generating conditions that stimulate student involvement.”
Considering that engagement is a two-way stream between HEIs and the students, we should have in mind two parameters. Firstly, students should regard course engagement as being of importance for their learning outcomes and therefore would care to be involved. Secondly, HEIs should provide course engagement schemes which are student and not teacher centered.

Therefore, within this context and acknowledging the impact of student engagement in learning, the aim of this research is to explore student involvement and engagement in the Marketing Division of a HEI. It also has four objectives. The first objective is to examine if students perceive course involvement schemes as important ones in course engagement; secondly, how this impacts on their individual learning outcome. Additionally, it explores how students evaluate the engagement schemes offered by HEIs in terms of expectations. Lastly, it investigates their satisfaction level from these schemes. The Marketing courses offered by the Marketing Division of Eastern Macedonia and Thrace Institute of Technology’s (EMaTTech) Business and Economics Department, which is in its second year of operating, are considered to be a case study. The results of this study are very significant for the proper function of the division, providing guidelines for improvement of the division itself and higher levels of students’ participation.

3 GREEK HIGHER EDUCATION INSTITUTES – THE CASE STUDY

The Greek higher education system is divided into the University sector (universities, polytechnic schools, and the School of Arts) and the Technological sector consisting of Higher Technological Education Institutions: HTEI (Giousmpasoglou et al. 2016). Universities are more theoretical and HTEIs have a more practical orientation (Pegkas and Tsamadias 2014). As article 16 of the Greek Constitution states, HEIs fall under the supervision of the Government and specifically under the supervision of the Ministry of Education (Boer and File 2009). Its current name is “Hellenic Ministry of Education, Research, and Religious Affairs.” Enrollment in HEIs occurs after taking part in the Pan-Hellenic exams and studies are free of tuition since education is considered a “public good” (Gouvias 2011). Moreover, HEIs are share funded by the Ministry of Education, Research, and Religious Affairs as determined by article 16 of the Constitution (Gounari 2012), though funding in Greece is amongst the lowest in the EU, even before the economic crisis (Gouvias 2011).

Gouvias (2011) states that in 2004 the public expenditure on education as a percentage of Greece’s Gross Domestic Product (GDP) was 3.8%. This view was also reported by UNESCO’s Statistical Yearbooks. Since the memorandum of understanding in May 2010, the four different elected governments who have ruled the country have announced numerous austerity measures. Under these austerity measures, public sector funding was cut (Priporas et al. 2015). Seven years after the 1st memorandum of understanding, today’s government keeps imposing austerity measures so that the Troika (European Commission -International Monetary Fund - European Central Bank) will bailout Greece, with dramatic consequences for the Greek economy and society.

Amongst these cut-offs, the Higher Education System (HES) would not be spared. As stated in the report of the European Commission (2013), Greece was amongst the countries with the higher cut-offs due to the economic crisis. Additionally, the European Commission (2015, p. 3) in its report regarding education and training in Greece, stresses that as described by the Hellenic Government (2015) the Greek authorities report a 36% drop in funding for education during the years 2009-2015. Also, as stated by the Hellenic Ministry of Finance (2015, in European Commission, 2015, p. 3) the funding of education as regards to a percentage of the Greece’s GDP was 2.7%. This percentage rose slightly to the year 2011 (3.0%) and again decreased to 2.3% of GDP for the year 2015.
This decrease in funding, in turn, had as one of the consequences tremendous brain drain of academics (Marinakou et al. 2016). Moreover, due to the 10:1 leave -recruitment (2nd memorandum), while many professors left on a pension or gave their registration to work abroad (brain drain), no personnel were replaced. Consequently, leaving HEIs and especially regional ones struggling to survive with extremely few funds and staff.

One of the regional HEI’s in the country and today understaffed is the Eastern Macedonia and Thrace Institute of Technology (EMaTTech). EMaTTech consists of 9000 students enrolled with a total tenure track academic staff is only 73 in the following 4 Schools:

- School of Technological Engineering (3 departments);
- School of Business and Economics (2 departments);
- School of Agricultural Technology (3 departments); and
- School of Health and Welfare (1 department).

In 2013 with the “ATHINA I” project from the Ministry of Education, there were merges between departments of HTEIs’ and simultaneously development of divisions within the departments. Regarding EMaTTech and specifically the Business and Economics School, two departments were merged: Dept. of Business Administration and Dept. of Business Informatics, and simultaneously, 3 divisions were developed: The Business Administration, the Business Informatics, and the Marketing Division. This program -curriculum started running from the academic year 2013-2014, and divisions would start from the 5th semester of studies, i.e. 3rd year of enrolment and would last 2 years, i.e. 4 semesters.

As so, the Marketing Division first started to operate during the academic year 2015-2016 (in the 5thsemester of studies) and is going through its 2nd year of operation. The Marketing Division offers 11 “pure” Marketing Courses and has two tenure track professors, which also teach other 4 Marketing courses in the core semesters. Additionally, it has one adjunct assistant professor and 40 students which enrolled for the academic year 2015-16; when it first functioned.

4 METHODOLOGY

A questionnaire was developed specifically for this purpose, with the goal to elicit answers regarding the aim and objectives of the study. The questionnaire was developed based on the before-mentioned research as well as informal conversations with students enrolled in the Marketing Division. The questionnaire consisted of 11 questions, of which 7 are multi-item questions and 5 are socioeconomic and demographic questions. Regarding involvement- engagement, 4 questions (same 11 items), rated on 5 point scales were explored:

- students’ perception if course involvement -engagement is perceived as important;
- assessment of their own learning outcome (self -reported) based on course engagement-involvement styles;
- evaluation of course involvement styles offered by the division, compared to students’ expectations, and lastly,
- satisfaction from them.

The questionnaire was developed on Google.docx forms and the questionnaires’ link was distributed via Facebook to students, in the Marketing Division group, and few links were e-mailed to students who did not own a Facebook account. A total of 34 students out of 40 took part in the research, having an 85% response rate. Data analysis included frequencies, percentages, and means.
After results were derived, they were posted on Facebook in the Marketing Group of the (now) 7th semester students. Students were asked to read the results of the study and to gather the second week of the semester to discuss changes in the way the courses are delivered in the Marketing Division.

5 RESULTS

5.1 SAMPLE

From the students participating in the research 14 were men (41%) and 20 were women (59%). All students were in their 6th semester of studies, enrolled in the Marketing Division in the 2015-16 academic year. Regarding their age, 5.9% were 20 years old; 76.5% were 21 years of age; and 17.6% were 22+ years old; with mean age 23.4 years (StD=6.44). Moreover, 76.5% live in urban and 23.5% in rural areas. As to their monthly income (from any income source), the average overall income was 488.97 € (StD=294.98). Specifically, 35.4% have a monthly income up to 300.00€; 41.2% 300.01-600.00€; and 5.8% has an income 600.01-900.00€. Lastly, 17.6% has high income of more than 900.01€, which were the eldest of the sample and all working in the public sector.

5.2 REASONS FOR ENROLLING IN THE MARKETING DIVISION

Eleven statements (derived from informal students’ conversations) which referred to reasons for enrolling in the Marketing Division were rated on a 5-point Likert scale (1=completely disagree; 2=disagree; 3=neither agree nor disagree; 4=agree; and 5=completely agree). Specifically, their attitudes were rated in pre-experience and post experience conditions. The pre-experience condition which examined reasons for choosing the Marketing Division (Table 1), revealed that 5 statements had Mean Score MS>4.01. The three statements with the highest MS, are that the students enrolled in the Marketing Division because: they consider the courses interesting (MS=4.41); they will learn many things in this division (MS=4.29); and they will have better job opportunities (MS=4.08).

Continuously, in the post-experience condition, they were asked to rate again these statements after their one-year experience. Thus, after their one-year experience students consider that the courses are interesting (MS=4.41); that they will learn many things in this division (MS=4.32); and that there is immediacy with the Professors, due to the few number of students enrolled (MS=4.18). The statement which they disagree with is that the Marketing Division is easy or has easy courses.
<table>
<thead>
<tr>
<th>Reasons for enrolling in the Marketing Division Vs evaluation regarding reasons for enrolling</th>
<th>Mean Score Before experience</th>
<th>Mean Score After experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>I considered it easy- has easy courses</td>
<td>2.41</td>
<td>2.32</td>
</tr>
<tr>
<td>I think that I will learn many things in this division</td>
<td>4.29</td>
<td>4.32</td>
</tr>
<tr>
<td>It has good student / teacher ratio</td>
<td>3.70</td>
<td>4.12</td>
</tr>
<tr>
<td>We are few students and so there is immediacy with the professors</td>
<td>4.05</td>
<td>4.18</td>
</tr>
<tr>
<td>We are few students and so there is greater interest by the professor</td>
<td>3.79</td>
<td>3.88</td>
</tr>
<tr>
<td>The courses in the curriculum are very interesting</td>
<td>4.41</td>
<td>4.41</td>
</tr>
<tr>
<td>The Professors know very well the subjects that they teach</td>
<td>4.05</td>
<td>4.09</td>
</tr>
<tr>
<td>The Professors have transmissibility</td>
<td>3.73</td>
<td>3.96</td>
</tr>
<tr>
<td>I think I will have better job prospects</td>
<td>4.08</td>
<td>3.98</td>
</tr>
<tr>
<td>I consider the courses “catchy”</td>
<td>3.67</td>
<td>3.50</td>
</tr>
<tr>
<td>I consider the courses &quot;in fashion&quot; - &quot;in&quot;</td>
<td>3.38</td>
<td>3.47</td>
</tr>
</tbody>
</table>

Table 1: Reasons for enrolling in the Marketing Division; before and after experience

5.3 INVOLVEMENT- ENGAGEMENT -SELF REPORTED LEARNING OUTCOMES- EVALUATION AND SATISFACTION

5.3.1. IMPORTANCE OF INVOLVEMENT- ENGAGEMENT SCHEMES

Students were presented with 11 involvement schemes (mentioned during informal discussions and previous researches), and were asked to rate their importance in developing course engagement (Table 2-Column 2). Statements were rated on a 5-point importance scale (1= very unimportant; 2= unimportant; 3 = neither important nor unimportant; 4 = important; 5 = very important). Findings show that students perceive all involvement schemes presented as important to develop course engagement, with no statement having MS>4.51. The three most important involvement schemes which produce course engagement are according to the students: engagement with the society and its problems (MS=4.44), essays and tasks (MS=4.35) and research (MS=4.35). On the other hand, traditional teaching in class is perceived as the least important course engagement scheme (MS=3.09).

5.3.2. SELF-REPORTED LEARNING OUTCOMES BASED ON INVOLVEMENT- ENGAGEMENT SCHEMES

Additionally, students rated on a 5-point scale (1= not at all up to 5= very much, with 3 being the neutral point) if these 11 engagement schemes help them produce a positive learning outcome (Table 2- Column 3). Self-reported learning outcomes based on course involvement-engagement schemes revealed that no statement had MS>4.51. the three involvement schemes with the highest MS were: engagement with the society and its problems (MS=4.29), visits and trips to industries and businesses (MS=4.23) and thirdly essays and tasks in courses (MS=4.21) are involvement schemes which will help them obtain the best learning outcome. On the other hand, traditional in-class teaching is the involvement scheme which produces the lowest learning outcome for students as they reported (MS=3.03).
5.3.3. EVALUATION OF INVOLVEMENT – ENGAGEMENT SCHEMES

Continuously, students were asked to evaluate compared to their expectations the use of each involvement schemes in the Marketing Division (Table 2- Column 4). Answers were rated using a 5-pont evaluation scale (1= a lot worse than I expected; 2= worse than I expected; 3 = same as I expected; 4= better than I expected; 5= a lot better than I expected). Results showed that students considered better than expected “Essay presentations in order to improve the way students do presentations in front of an audience” with MS=4.03; with the other 10 statements having a MS ranging from 3.03 -3.79. This means that students were well informed of the course involvement schemes the Marketing Division offers (in cases where: 3.00<MS≤3.50) or they tend to consider them better than expected (in cases where: 3.51≤MS<4.00).

5.3.4. SATISFACTION OF INVOLVEMENT- ENGAGEMENT SCHEMES

Lastly, students were asked to rate their satisfaction (Table 2- Column 5) from the offered involvement schemes, on a 5-point satisfaction scale (1= completely dissatisfied; 2= dissatisfied; 3 = neither satisfied nor dissatisfied; 4= satisfied; 5= completely satisfied). Students did not rate any involvement scheme >4.50 and so were not completely satisfied from any engagement scheme offered. Two engagement schemes were considered satisfactory, both having to do with essays: “Essays and tasks in courses, in order for the students will by themselves search more regarding the specific issue” and “Essay presentations in order to improve the way students do presentations in front of an audience” with MS of 4.09 and 4.00 respectively. Additionally, four statements were rated between 3.51-3.99, implying a tendency towards satisfaction; 3 statements were rated as neither satisfied nor dissatisfied, with MS ranging between 3.00-3.44; and one statement was rated with dissatisfaction, having a MS=2.62: “Academic study trips abroad”.

68
<table>
<thead>
<tr>
<th>Statements</th>
<th>Perception</th>
<th>Self-report</th>
<th>Evaluation</th>
<th>Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case studies</td>
<td>3.82</td>
<td>3.44</td>
<td>3.21</td>
<td>3.32</td>
</tr>
<tr>
<td>Visits -trips to businesses or for the courses required e.g. industrial marketing</td>
<td>4.32</td>
<td>4.23</td>
<td>3.77</td>
<td>3.85</td>
</tr>
<tr>
<td>Engagement with the society and its problems, for the courses required e.g. social marketing</td>
<td>4.44</td>
<td>4.29</td>
<td>3.77</td>
<td>3.82</td>
</tr>
<tr>
<td>Essays and tasks in courses, in order for the students will by themselves search more regarding the specific issue</td>
<td>4.35</td>
<td>4.21</td>
<td>3.79</td>
<td>4.09</td>
</tr>
<tr>
<td>Traditional in class teaching</td>
<td>3.09</td>
<td>3.03</td>
<td>3.21</td>
<td>3.29</td>
</tr>
<tr>
<td>Conduct research (primary- secondary), so students will create themselves knowledge and bring it to class</td>
<td>4.35</td>
<td>4.06</td>
<td>3.74</td>
<td>3.79</td>
</tr>
<tr>
<td>Real business and real situation analysis</td>
<td>4.23</td>
<td>4.12</td>
<td>3.41</td>
<td>3.65</td>
</tr>
<tr>
<td>Students debate on issues in order to improve their argument</td>
<td>3.94</td>
<td>3.82</td>
<td>3.29</td>
<td>3.29</td>
</tr>
<tr>
<td>Essay presentations in order to improve the way students do presentations in front of an audience</td>
<td>4.17</td>
<td>4.06</td>
<td>4.03</td>
<td>4.00</td>
</tr>
<tr>
<td>Written essays in order to improve the way students write</td>
<td>3.70</td>
<td>3.53</td>
<td>3.59</td>
<td>3.44</td>
</tr>
<tr>
<td>Academic study trips abroad</td>
<td>4.21</td>
<td>3.94</td>
<td>3.03</td>
<td>2.62</td>
</tr>
</tbody>
</table>

Table 2: Perception, Self-reported learning outcome, Evaluation, and Satisfaction from involvement – engagement schemes.

5.4 OVERALL SATISFACTION

Students were asked to rate their overall satisfaction regarding their experience in the Marketing Division, on a 5-point satisfaction scale (Table 3). All statements had a Mean Score: MS>3.75 meaning that students tend to be satisfied from the Marketing Division. Two statements have MS>4.00, i.e. students are satisfied with the knowledge that professors of the courses have, and the acquired knowledge from the courses (MS=4.30 and 4.03 respectively).
**Table 3: Students overall satisfaction regarding the Marketing Division %**

<table>
<thead>
<tr>
<th>Statements</th>
<th>Completely Dissatisfied</th>
<th>Dissatisfied</th>
<th>Neither Satisfied / Dissatisfied</th>
<th>Satisfied</th>
<th>Completely Satisfied</th>
<th>MS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professors knowledge</td>
<td>0.0</td>
<td>0.0</td>
<td>2.9</td>
<td>64.7</td>
<td>32.4</td>
<td>4.30</td>
</tr>
<tr>
<td>The work that is done in the division</td>
<td>0.0</td>
<td>11.8</td>
<td>17.6</td>
<td>44.1</td>
<td>26.5</td>
<td>3.86</td>
</tr>
<tr>
<td>Motivation from the Professors</td>
<td>0.0</td>
<td>8.8</td>
<td>14.7</td>
<td>47.1</td>
<td>29.4</td>
<td>3.97</td>
</tr>
<tr>
<td>Help from the Professors</td>
<td>0.0</td>
<td>11.8</td>
<td>23.5</td>
<td>44.1</td>
<td>20.6</td>
<td>3.79</td>
</tr>
<tr>
<td>Acquired knowledge from the courses</td>
<td>0.0</td>
<td>2.9</td>
<td>17.6</td>
<td>52.9</td>
<td>26.5</td>
<td>4.03</td>
</tr>
</tbody>
</table>

**6 ACTIONS BASED ON OUTCOMES**

After a two-week that research results were posted in the marketing group, professors and students discussed how to improve students’ engagement with the courses. Discussions revolved mainly with the involvement-engagement schemes that are considered important for learning outcome but also have low satisfaction scores. Top on the list was the academic trips abroad (MS=2.62), which is considered extremely important for acquiring knowledge. The problem identified had to do with the lack of funds for academic trips in other parts of the country or abroad. Extreme cut-offs from the Ministry of Education, does not allow funding of trips on one hand, and on the other hand student cannot pay the total cost for a trip, due to the economic problems that they and their families face. For so, academic trips that would cost students were rejected as an idea. As second best solution was to investigate the possibility to talk to marketers from successful businesses and industries either from other parts of the country or from abroad through Skype. This option was voted from all, and today it is applied in almost all the courses. Additionally, trips to industries, cooperatives and businesses which are in accessible areas are frequently provided.

Another engagement scheme which is considered important for students learning outcome, but was scored very low was “students debate on issues in order to improve their argument” (MS=3.29). For so, it was decided that in courses that it is feasible, students would work in small groups, that would debate on courses issues.

Additionally, for the involvement scheme regarding “Real business and real situation analysis” (MS=3.65), these are today managed on 3-axons. Either as:

- case studies analyzed from businesses that students visited or
- case studies given from the professors or
- case studies derived from the discussions with businesses and their marketing staff (e.g. Skype as beforementioned).
Students consider the three abovementioned involvement schemes as important for gaining a better learning outcome and simultaneously have the lowest satisfaction scores. The other involvement schemes that are considered important by students have higher satisfaction rates, and thus need a little “boost” in the sense to be used in other courses which would allow them to be used. Hence, with the use of these methods in the courses the students themselves will be more involved and acquire first-hand knowledge which they will bring in the classroom and inform their classmates.

7 CONCLUSIONS- LIMITATIONS OF RESEARCH -DIRECTIONS FOR FURTHER RESEARCH

This research dealt with involvement-engagement schemes that are offered by the Marketing Division in a Higher Education Institute in Greece. It investigated students’ perception of course involvement-engagement is perceived as important; assessment of their own learning outcome (self-reported) based on course engagement-involvement styles; evaluation of course involvement styles offered by the division, compared to students’ expectations, and, satisfaction from them. Lastly, it investigates overall satisfaction from their experience from the Marketing Division. This research shows that the Marketing Division being in its infancy, has a big challenge: to keep students engagement high with courses by providing interesting involvement schemes, with the lowest cost possible.

Because education and knowledge acquirement is a continuous process, while each semester the audience may differ, this research will be taken at the end of each academic year in order the required changes to be realized on the basis of student’s attitudes.

This study, is not hapless of limitations, which provide guidelines for further research. First of all, and regarding the HEIs, this research is limited to one HEI in Greece, secondly, it was conducted at a public HEI, and thirdly, at a HTEI. For these three reasons, it is not possible to generalise outcomes to all Marketing Divisions in Business Schools. A further research in other HEIs that have Marketing Divisions would strengthen the results of this study. Additionally, this research had a small sample-of 34 out of 40 students which enrolled in the Marketing Division, since it was conducted in the 2nd year of its operation, and the questions refer to the students that experienced one year courses in the Division. So, a larger sample is also needed for further analysis and validation of the outcomes. Moreover, this study was based on involvement and consequently engagement schemes that were mentioned by the students and were obtained by previous research too. There might be other involvement schemes that would increase learning outcomes. For so, an in-depth qualitative research is recommended in order to validate the items in the questionnaire and /or add more items to it.

Even though this research has the above limitations it is considered very valuable, for the academic staff operation in the Marketing Division, since it provides insight with involvement-engagement schemes that the students themselves consider important, helps them in better learning outcomes and produces satisfaction.
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8 Paper: Entrepreneurship education - a case of creativeness and entrepreneurship empowerment

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Keywords: entrepreneurship education; creativity; problem-based learning

ABSTRACT

An entrepreneurship behavior barrier is the fear of risk and poor entrepreneurial culture of the population. But, in spite of this people may be extremely creative, just not knowing or being afraid to take the step up to implement their innovative ideas and projects. In this sense our project proposes the development of activities to be implemented very early on and empower the entrepreneurial attitude. Therefore, we consider that the elementary school has unique characteristics to the possible introduction of this project, in particular when we hook up with higher education institution connected to the professional practice teaching methodology, the HEI, namely Polytechnic Institutes. Therefore, promoting creativity and entrepreneurship behavior in primary school children and connecting it to entrepreneurship work develop in a High Education Institute with undergraduate students, is the main goal of our project that also pretend to make the link between the two type of levels of education, proposing a multidisciplinary project in multi-level type of education. This project has a methodology of entrepreneurship education centered in the problem-based learning perspective in both level of education and exploring the creativity and analysis implementing the methodology of the “Six Thinking Hats of Bono” with the primary education schools. By putting into action this project we pretended to prove that the empowerment that young children would embrace after the project, being creative, learning to reflect and analyze all perspectives of making things and trying and experiment how to make them, would create on them the access risk in a different way.

On the other hand of the education level, in HEI, we tried to promote creativity on students making them to find a way to produce “crazy” ideas and trough that learn to take changes, analyze problems and find solutions and make things happen. At the end of the project the entrepreneurship attitudes and behavior are assessed to confirm, or not, the empowerment and the competence development in analyzing in a problem-based learning view.

INTRODUCTION

The role of entrepreneurship in terms of the economic development has been recognized by several theorists over time, among them Schumpeter (1934), Kirzner (1997), Baumol (2002) and Acs et al. (2004).

The entrepreneurship concept has always a reference to the attitudes towards the environment and its response capacity in the sense of constructing solutions that add value to the society. To the European Union (2012), entrepreneurship is related to the individual ability to turn ideas into actions, where this ability is linked to creativity, innovation and risks acceptance, as well as the ability of planning and project management, in order to achieve goals.
Also Heinonen and Poikkijoki (2006) say that entrepreneurial behavior is widespread, which is related to the call for bigger and better business skills in order to face growing challenges and uncertainty of the future. According to these authors, the attributes related to the entrepreneurial activity are high availability for change, self-confidence and creativity, as well as an innovative approach to solving problems.

The innovation idea has been constantly linked on the different aspects of entrepreneurship - in most developed economies, long-term economic growth relies increasingly on business creation and the fact that these generate innovation in terms of products, services and processes. The process of innovation is closely linked with the concept of enterprise, because its creation is in itself an innovation (Drucker, 1985). But the innovation intensity differs depending on the company that creates, since the motivation of organizations to produce innovations is to generate value, thereby increasing its competitiveness and promoting their survival (Mulet, 2011). In this sense initiatives that do not rely exclusively on innovation, but rather in replication, assume also relevance (Kirzner, 1997). In general, entrepreneurship research shows that the level of entrepreneurship is favored by cultures that value and promote the need for selfrealization, autonomy and conquest (Hayton, George and Zahra, 2002). Thus, the antipathy by uncertainty, found by Hofstede (2001) on Portuguese culture is also an inhibitor of entrepreneurship and this trait may explain why the level of companies’ creation is low, even when the effort in education for entrepreneurship has evolved positively, particularly in higher education. The challenge with which Portugal has been facing is to replace the culture of penalization of the error for an entrepreneurial culture, opening paths to creativity and innovation (Robinson, 2006, 2001, and Amaral, 2009) and using the error as a form of evolution (Ferreira 2011 and Monteiro 2011 cited in Teixeira, C. 2012). Already Dolabela (2003, p. 30) states that the "culture has the power to induce or inhibit entrepreneurial capacity", noting that entrepreneurial education must begin with children, as it may influence their behaviors as future professionals.

The difference between entrepreneurs and non-entrepreneurs is in society (Sadler-Smith et al. 2003). The entrepreneur values creativity, takes risks, is based on an informal organizational structure concerned in formulating strategies and in identifying opportunities. The non-entrepreneurial, for its part, emphasizes the planning, control, monitoring, and evaluation is based on a formal organizational structure. It is important, therefore, to create an educational system capable of collaborating with the society in which it is inserted, which can affect changetechnological, social, economic – for its development, causing a greater interaction between school and society (Friedlaender, G., 2004). Creativity is believe to has an important role in the economy since is crucial to assist nations to achieve higher levers of employment and innovation (Davies, 2002 and Burned, 2006 cited in Shaheen, 2010). That’s why creativity has to be present in schools in their education curriculum and pedagogy (Wilson, 2005 cited in Shaheen, 2010).

The currently accepted and implemented model, in the European Union, to frame the notion of entrepreneurship education is based on Heinonen and Poikkijoki (2006) propose and its main objective is to provide students with the attitudes, knowledge and skills for entrepreneurial action, having the different dimensions of education for entrepreneurship to be deployed in multiple categories, which constitute the framework of the various learning outcomes implemented and achieved by the countries of the European Union.

To enable a student to acquire entrepreneurial skills is to provide a more creative education, developing his talent and potential. Currently there is an education based on the errors, in denial of the subject (Friedlaender, G, 2004).
Through the entrepreneurship teaching will allow students the possibility start from what he knows which means that errors and ignorance become possibilities of creation and new solutions, losing the connotation of failure (ibidem, 2004). In this way, learning to undertake should be a stimulating, creative activity and with quality. Creativity in the current era of innovation is getting increasingly important in which all professionals need to get creative (Corrêa, T., 2008) which is considered as nothing more than an electric impulse in the human brain and a potential boost.

In summary, it is inherent to the individual, it can be exercised and developed and must be unlocked and rescued in essence (ibidem, 2008). We know that all individuals are born creative and that over time are being blocked and inserted in a social model not to be nonstandard governing the collective spirit. Thus, education for creativity should be based on self-knowledge exploitation (Gardner, 2007). In our society the creativity is sought-after, cultivated, cherished. (ibidem, 2007) and for that many entrepreneurs are conducting courses to understand and learn to perceive the intuition which is nothing more than an exercise in self-knowledge.

Despite this reality, it is essential to make it clear that creativity requires hard work, discipline, commitment and above all courage to do different from the majority, pursue unknown paths and often scroll through them alone. This reflection requires a demystification that ideas appear out of nowhere they don’t fall from the sky. They need to be cultivated and exercised continuously (Corrêa, T., 2008).

In a proposal of teaching and learning, according to Predebom (2005), our creativity can be induced when adopting pre creative behaviour patterns, enabling the development of a creative personality. Consequently, allows the student to understand his individual process of creation.

METHODOLOGY

Analyzing the studies of Gardner (2007) and taking into account the above, we tried to develop a teaching methodology and a method of exploring the creativity that would provide children from the first years of schooling (accordingly to the author just mentioned the children under 5 years are at their maximum exponent of creativity), in primary education, a free development of their creative potential. We want to provide the ability to implement their imaginary, as referred by Dolabela in his Entrepreneurial Theory of Dreams (2003), and therefore contribute to a more effective education of entrepreneurship, enabling future professionals and opposing the current social environment so they may contribute to the behavioral change that, today, it’s so urgent. Therefore, the proposed methodology has to be based on modelling creativity, with the goal of breaking paradigms and rescue the children's imagination, unlocking creativity, through playful activities, artistic and interpretative (Cury, 2003).

We assist to a change in the educational policy in schools around the world to combine creativity and knowledge (Dickhut, 2003 cited in Shaheen, 2010). So, creativity in fundamental for entrepreneurs since they have to have new ideas with novelty, usefulness’ and appropriateness to it and also because to have the capacity of creating a sustainable commercial value from those ideas (Duxbury, 2012). In view of the above, we observe how important is to make the link between creativity and innovation which are apparently a paradox. The cognitive psychological perspective show us that this contradiction tendency may be alternatives ways of a more general propensity to people to store information in organized structures and then access this knowledge to implement their activities (Ward, 2004).
In 1994 and 1995, Runco and Chand (Ward, 2004) have described models that includes process of ideation and evaluation that interact between them and with the knowledge and motivation to determine creative results. In addition to these authors, others creativity models include steps as problem definition or discovery (e.g. Basadur, 1996, 1997; Mumford et al., 1991; Stenberg, 1988; Treffinger, 1994; cited in Ward, 2004) in the belief that the way people contextualize a problem strongly influences their probability of reaching an original or creative solution (Ward, 2004).

Other issue is the effective knowledge acquisition, in particularly in a way that creativity can be used to develop innovative solutions. One of the theory for knowledge acquirement that seems to be able to integrate both perspectives is the Problem Based Learning (PBL) because it stimulus people to restructure information that they already know within a realistic context to gain new knowledge and to elaborate on the new information they have learned (Kilroy, 2014). It differs from the “traditional” approaches of teaching because students are stimulated to selfdirect learning skills and to be critical in analyzing scenarios and at the same time being objective in collecting additional information to develop the innovative solution for the initial problem (ibidem, 2014). PBL relies in a three pillars: Ill-Structured Problem; Student-as-Stakeholder; and the Teacher as (Metcognitive) Coach. In this way, accordingly with several authors (e.g. Shin and McGee, 2003; Barrows, 2002; Dods, 1997; Jones, Beau Fly; Rasmussen, Claudette M.; Moffitt, Mary C., 1997) the “Ill structured problem”, that consists of a problem which is described in an ambiguous way, that needs more information research to be more clear and that can be solved in more than one way, that have different possible solutions. When we considered “students as stakeholders” we are saying that they have a significant knowledge and have to make it useful and give it a meaning and select and evaluate their options, monitoring the process towards the solution and at the same time have to defend and give evidencedriven arguments. The role of the teachers as coaches is important to guide students in an ethic perspective of the solutions definition process and help them to develop their self-awareness process of thinking and seeking information (Kilroy, 2014).

This model helps developing learning and interpersonal skills and potential the learner confidence, while doesn’t kill creativity but allowing it to have a crucial part in the resolution/innovation process. It seems that the model may be the one the potential more the entrepreneurs attitudes as they been described before. Conscientious that we are dealing with children of young age and that might be difficult for them to assume these roles we also follow the “Six Thinking Hats”, by Edward Bono, method so they could easily assume the parts as long as they had the hats on. This method, accordingly to Xerxen (2012), has two main objectives:

1. To simplify thinking, by allowing a thinker to deal with one thing at a time;

2. To allow a switch in thinking.

In this way, instead of having to take care of emotions, logic, information, hope and creativity all at the same time, the thinker is able to deal with them separately. Moreover by turning it into role-playing, the concept of the hats makes it possible to request certain types of thinking (Xerxen, 2012). The Six Thinking Hats is tailored so as to stimulate the inner creativity of participants and to help them to discover how to turn seemingly insoluble problems into real opportunities. With this methodology in mind we defined our implementation plan to pursue the project goals.
PILOT PROJECT

The didactic innovation pilot project we propose, "Produz@idea", fits on theoretical reflection exposed, intending to promote creativity and enhance the power of realization of dreams or ideas, while entrepreneurial skills. This project was born of the need to find a methodology of entrepreneurship education for teachers of basic education could use in their students. This didactical methodology of teaching of entrepreneurship is based on a multidisciplinary interaction of different scientific areas to the extent that the products/services imagined by the children may have to be achieved by combining technological and scientific skills. To be developed by professors of the Polytechnic, naturally drew a design of didactic innovation that makes the bridge between these two levels of teaching, encouraging and using the creative potential of the students of basic education and the power of knowledge and technical realization of Polytechnic School students. In this way Produces @ Idea allows working student’s entrepreneurial skills and abilities of the two levels of education.

Objectives of this project are therefore to:

- Encourage creativity in children (elementary school) and young (higher education);
- Empower the entrepreneurial attitude;
- Reduce the fear of risk, through collaboration among peers;
- Making dreams come true, making you believe in their potential for creation, always present;
- Involve the institutions of higher education and primary education.

Is important for the success of this project that everyone involved in the different steps of this process knows what is happening and how the is going to come true. So the ICT are an important tool also to take into account as are through them that easily and creatively we may involve and motivate all the intervenient of this process.

Due to the exposed, Produz@idea implementation in primary schools went through three different steps:

Step 1 (Primary Schools Students)

The researchers went to the two participating schools in the city of Guarda to have short working sessions with primary student classes. While there, they had work for minimum one hour with the PBL and the Six Thinking Hats, promoting the discussion of ideas concerning different areas and their possible solutions. The Six Thinking Hats were seen as a very important part of the work by the children. In their way of thinking it was a completely different process of working. Also from our experience during this year, we feel that their participation need to be encourage to contribute with their valuable opinions. They need to feel the importance of sharing their thoughts and more important than this, the ideas could have a good value, no matter the crazy that they could be. He had ask the children to share their ideas by drawings in the end after the discussion period;

Step 2 (Young Students)

After collecting and analyzing the ideas presented by the children, the authors separated them in several areas: food products, engineering and services. Later discussing the logistic aspects we had choose the food products area for a first experience. Then these were presented to young undergraduate students at Polytechnic of this area. They had understood them and study how they could implement them by using their knowledge and creativity. During this process of developing the idea the authors were updated time to time. Before the final meeting the food products were present and explained.
Step 3 (Children and Young Students)

In the end of the year there was a final meeting in the Polytechnic facilities, here the ideas dream by the children in the beginning had appear converted into solid projects capable to be seen as final products used in our daily life.

These three steps were carry out always with the help of the authors that had supervised all the process, interfering the minimum to keep the ideas from the children and also from the students uncontaminated. This had given the necessary flavor of purity and originality that turn the project in a successful mission.

Step 4 (validation process)

The process of validation was developed by an in-depth interview of the students’ teachers to observe if the children altered their behavior in the different subjects and activities realized in school in a more creativity and entrepreneur perspective. This interview was not structured so it would be possible to orient the conversation to the main subject wanted. The interviewer has to have control of the conversation all the time and keep focusing the talk to objectives questions that permit to evaluate the required behaviors. There will be some written questions to make sure that all the teachers involved have to answer them but beside these requests, the interview has to be completely free. The guidelines of the interviews were defined as table 1 shows:

<table>
<thead>
<tr>
<th>Category</th>
<th>Subcategory</th>
<th>Indicators</th>
</tr>
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<tbody>
<tr>
<td>1. Legitimation of the interview</td>
<td>1.1 Background and objectives of interview</td>
<td>Inform the respondent about the context/scope of the interview and its objectives</td>
</tr>
<tr>
<td></td>
<td>1.2 Motivation of the respondent</td>
<td>Stressing the importance of cooperation of the respondent to perform the work</td>
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<td></td>
<td>1.3 Confidentiality and anonymity</td>
<td>Ensure the confidentiality and anonymity of the data collected</td>
</tr>
<tr>
<td></td>
<td>1.4 Authorization for audio recording</td>
<td>Request authorization for the audio recording of the interview, to facilitate the collection and organization of data for further analysis</td>
</tr>
<tr>
<td>2. School description and teacher profile</td>
<td>2.1 Characterization of the school</td>
<td>Number of classes and students</td>
</tr>
<tr>
<td></td>
<td>2.2 Characterization of the teacher profile</td>
<td>Teacher level of teaching and education pedagogies and methods</td>
</tr>
<tr>
<td>3. Project</td>
<td>3.1 Project Implementation</td>
<td>Student background and behaviour pre and post project</td>
</tr>
</tbody>
</table>

*Table 1 – interviews guidelines*

The validation process within the HEI students and teachers were made through group interviews since the main goal here were to evaluate the impact of the challenge and the students ability to respond. One focus group was created mixing teacher and students because the goal of the interview permitted it. The discussion was motivated by showing photos and pictures taken during the implementation process of the project.

So, it was possible to see the main difficulties and identify the strengths of this process, designing new ways to implement this type of challenges and even, maybe enlarge the scope of the challenges integrating a business perspective.
DISCUSSION

The pilot project was implemented in the two selected schools. We were able to involve, in total, 50 children, 4 teachers and 15 students from our School of Tourism and Hospitality Management. These types of new and bold projects, like Produz@ideia, always need time to be comprehended by the education system. In our case, the primary schools teachers were very enthusiastic by the participation of their students, referring the interest demonstrated during the year. Also they had state that some students start to be more engage on making questions and declaring their own opinion, not having afraid of saying something wrong. This is very important in the point of view of the curriculum and the necessary skills and competences need to be achieved.

We are confident to say that in generally the goals were achieved, but in particular the capacity of boosting an important dosage of creativity in children (elementary school) and youngsters (higher education) was the keynote of the work done, alongside the empower of the entrepreneurial attitude. Produz@ideia could be one more tool that HEI have to promote the need of changing mentalities in primary students and teachers, but also helping the older HEI students to change their mind set, preparing them to integrate the society by adapting to situations and being creative, being real entrepreneurs in action.

CONCLUSION

In this paper we explain the tendencies of entrepreneurship education and explored the main discussions on how it may be developed based in a more urgent need of creativity integration on educational curriculum and pedagogies, particularly as a way of reaching innovation and applied ideas to the economic context. So the link between creativity and entrepreneurship is made through knowledge. The pilot project we implemented contribute to reinforce the tendency of scientific link on exploring creativity and entrepreneurship competences development through a PBL method allied with the “Six Hats of Bono” to potentiately innovation and loose the risk emotion of failure within action and implementation. We believe that with Produz@ideia we were able to combine all these perspectives.
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9 Paper: Development of an Instrument to Improve Tutor Reflection of Individual Student Difference
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PURPOSE

This paper relates to part of a research project where an Intervention Instrument will be created in order to help teachers and students reflect on their learning experience. The development of the instrument is likely to involved aspects of critical reflection skills, transfer of learning skills, listening and questioning skills and emotional intelligence skills – in particular self-awareness of teaching approach. The development of the instrument will involve evaluation and testing to ensure appropriateness to the research purpose and data collection requirements. The instrument will be used for this research but in itself will be an instrument that others may also wish to use in other research projects.

METHODOLOGY

This is an action research project which aims to bring about ‘social change through action, developing and improving practice and, at the same time, generating and testing theory’ (Titchen and Binnie, 1994:2 in Titchen, 2015:2).

The research participants are:

- a group of five tutors delivering classes at the same university to groups of students who are at the same stage in their academic career
- their students

They will go through a three-step-cycle:

Stage 1: Pre-Intervention Teaching

In this stage the tutors teach their classes as normal. Data collected is observation data, interview data and focus group data from tutors and students. The interviews will be semi-structured and emphasise emergent data around the tutors’ awareness of individual differences in the class. This will establish a ‘benchmark’ position.

Stage 2: Using The Intervention Instrument

Stage 2 will use an instrument designed specifically for this research with the aim of assisting teachers to consider learner performance in the light of Biggs’ (2003:25) call for them to ask themselves, “What else could I be doing?” and his recommendation that they take an approach which focuses “on what the student does, on what learning is or is not going on”. The instrument will be developed around a process of reflexivity of the type recommended by Bolton (2014) in which she recommends deep level questioning, critical challenges to assumptions and searches for alternative perspectives.
Stage 3: Post-Intervention Teaching

The third stage will involve the same tutors as in stage 1 delivering classes again. Data will be collected from then and from learners concerning the experience using reflection skills – in interviews and focus groups. Tutors and students alike will be asked to reflect, to reconsider the questions and ideas discussed at the first stage and to note how this reflective process has changed their approaches, their procedures, their perception of the efficacy of particular teaching and learning strategies and how they might make changes in the future.

IMPACT/ IMPLICATIONS FOR PRACTICE

The instrument which is developed and tested will be useful for anyone wanting to research a similar phenomena.

Intervention research is part of Action Research indicated by Cohen et al. (2011:344) in Bell and Waters (2014:10) because “a problem involving people, tasks and procedures cries out for solution, or where some change of feature results in a more desirable outcome” In this case the desirable outcome should be a more effective learner experience.

The premise of this research is to underline the point made by Gould (1996: 1) in Thompson and Pascal (2012:313), which is that “practice wisdom depends upon highly developed intuition which may be difficult to articulate, but can be demonstrated through practice, ... reflective learning offers an approach to education which operates through an understanding of professional knowledge as primarily developed through practice and the systemic analysis of experience”.

It is hoped that by equipping a group of teachers with this ability to create and develop systems for reflecting on and improving classroom practice; their own and that of others, there should be an improvement in outcomes for learners. Both tutors and learners can benefit from this process in that they will now be able to engage in this systemic analysis and in a continuing reflective process.

FINDINGS/ RESULTS

The Instrument will be provided.
KEY REFERENCES


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10 Paper: In a Whirlpool of Globalization: Developing Pre-Service Teachers’ Global Competence

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ABSTRACT

The phenomenon of globalization and the ways it is related to the issues of education take on great importance in Russia’s higher institutions. In the era of globalization and information technology boom, it is imperative that university graduates become not only professionally but also globally competent specialists. The author briefly focuses on the essence of globalization and global education, offers an account of how global education issues are elaborated at the Birsk Branch of Bashkir State University (Republic of Bashkortostan, Russia), and concentrates on some aspects of global competence that the students (pre-service primary school teachers) need to possess to effectively work and interact in a 21st-century, turbulent and interdependent world.

INTRODUCTION

The ideas of globalization and their relation to education are widely being discussed in scientific circles, among politicians, scholars, educators, and university students throughout the world. Some people fully reject and refuse to accept this phenomenon under pretence of its ‘spoiling’ the fundamentals of their indigenous culture and national education, others try to understand and accept this notion, and still others completely accept the idea of globalization and associate with it all progressive changes in the new century’s educational space (Diaz, 1999; Merryfield, 2004; Sinagatullin, 2006; Sinagatullin, 2013). The situation in Russia is practically the same.

THE ESSENCE OF GLOBALIZATION

Apparently, the very idea of globalization and global development of humanity are not new issues in human history. There are hundreds of events and discoveries that have produced virtually a tremendous resonance and influence on the planetary scale. In the context under discussion I present just a few of such epoch-making breakthroughs: the emergence of Buddhism that was founded by Siddhartha Gautama (563-483 BC), which has spread far across India’s borders; the existence of the Roman Empire (753 BC-476 AD) that has made a magnum influence on the development of European and other cultures; the birth of Christianity in the 1st century, a system of beliefs that has turned into religion No.1 on planet earth; the emergence of Islam in the 7th century with its teachings having spread throughout the globe; Christopher Columbus’ opening of the Americas in 1492, which was followed by the exploration and settling of non-European continents by English and European peoples; Charles Darwin’s (1809-1882) theories of evolution; Leo Vygotsky’s (1896-1934) socio-cultural cognitive theory that has aroused a worldwide interest among students, pedagogues, and scholars; Sigmund Freud’s (1856-1939) psychoanalytic theories that has made a revolutionary impact on psychological and pedagogical theory and practice of child and human development; John Dewey’s (1859-1952) pedagogical ideas that have spread all over the world and contributed to advancing practical pedagogy in many countries; the emergence of football (soccer), which, among other types of sports, stands as a most legendary and global sporting activity (for example, in the 2016 European Football Championship the Portugal national football team won its first ever major trophy and became the European champion).
Nevertheless, the 21st century is witnessing a globalization radically differing from other global changes and developments, having occurred in the world. In the first place, a hectic impact of globalization is accompanied by the spreading of various forms of information technology promoting an unprecedented information expansion and dissemination of information and knowledge in all sides of life, with education being no exception. In connection with the influx of information technology, it is reasonable to relate globalization to information society. Even if not synonymous, globalization and information society are closely interrelated entities. As the new centennial continues gaining momentum, the notions such as information technology, digital technology, cyberspace, digital space (world) have come to light and spread worldwide. Thus, globalization and the contemporary epoch dramatically challenge the former, classical ways and means of cognizing the objective reality.

Globalization makes both positive and negative impact on education. It promotes integration of national systems of education into one global educational space; fosters positive reorganizations of the goals and content of secondary and higher education; promotes democratic reforms of educational systems; and fosters the ideas of global education, which will be the focus of further attention in this paper. On the other pole, globalization tends to shatter and destroy the unique and distinctive systems of national education and national culture by introducing Western and other foreign standards of education and child development; promotes the influx of English as a super gigantic foreign language, which ousts other foreign languages from educational and vocational institutions; and decreases the possibilities for children to an equitable and unbiased education.

GLOBAL EDUCATION

It is the ever-increasing process of globalization and the influx of information technology that necessitates the design and implementation of global education on all hierarchical levels, ranging from kindergartens to universities and on to the programs of educating the adult. Global education can be described from at least six perspectives (Sinagatullin, 2013). Global education is:

- an integral part of general education;
- a concept necessitating an unbiased attitude to alien cultures, ways of life and mentality. Global education requires that a school graduate look at the world as a unified wholeness, but, at the same time, understand that the world consists of numerous ethnic and racial groups, each boasting its own culture, language and modes of worldview;
- a new ideology requiring novel modes of thinking toward the monitoring of education as well as toward the issues of democracy, morality and freedom on the planetary level;
- a revolutionary and progressive movement emerged owing to contemporary globalization and socio-pedagogical changes occurring across continents;
- a continuous process whose objectives will be realized with different degrees of effectiveness, for the globalizing world and the entire global educational space engender myriad of problems that need to be continually and judiciously attended to;
- a new phase of democratization and humanization of the educational process. Despite their racial, ethnic and cultural background, all children, students, adults and people of middle and old age possess a set of common cognitive and physiological needs and drives. Sustaining, strengthening and furthering the ideas of democracy and freedom is a holy objective of global education.
Four general goals of global education can be put forward: (1) preparing the young generation to life, work and cooperation with people from various socio-cultural, ethnic and racial background; (2) developing a creative and reflective personality, capable of making constructive decisions and taking responsibility for the present state and future of the home country and the world; (3) improving academic achievement and motivating students’ cognitive development (as in any type of education); and (4) developing students’ global competence for them to favorably and productively function within their own micro-culture, mainstream culture and global society.

GLOBAL COMPETENCE

The issues of global education are elaborated in the Department of Pedagogy and Methods of Elementary Education (DPMEE) at the Birsk Branch of Bashkir State University, Bashkortostan, Central Russia. The Department maintains educational links with schools, lyceums, gymnasium, teacher training colleges, and higher pedagogical institutions. All the participants enlisted into the pedagogical and research sphere of the Department are working at the theme “Enhancing the educational process in the conditions of contemporary global changes.” This common theme includes the subtopics such as global/cross-cultural/international education; multicultural education; developing global competency of pre-service and in-service teachers; and teaching/learning languages and language policy in a globalizing and multicultural society. All these subdivisions are centered on global education or the issues related to global education. Also, we investigate global education as closely intertwined with multicultural education; therefore both go hand in hand in our research and pedagogical investigations.

Availing myself of the opportunity, I remind the reader that Russia is divided into 7 federal districts, which include 49 provinces, 28 autonomous republics, 6 territories, 1 autonomous region, 10 autonomous districts and 2 federal cities. The country is characterized by an ethnic diversity, represented by more than 130 ethnic groups; a linguistic diversity, determined by monolingual, bilingual and multilingual speakers; an array of religious diversity, represented by the adherents of Orthodox Christianity, Islam, Judaism, Buddhism and other smaller religions; a socioeconomic diversity with high- and low-income people that can be met among all ethnic and cultural collectives; and by an urban vs. rural diversity, where the distinctions between urban and rural life have always been marked and pronounced. Unlike the United States, Canada, Australian, New Zealand and contemporary countries of Central and South America, the current territory of Russia has since long been an ancestral land to almost all nationalities now inhabiting a nine-time-zone multicultural expanse.

Now let us return to the previous train of narration. Implementing global education involves resorting to a set of principles. A university educator intending to develop students’ global competency is required to pursue the principles of the integrative approach, the clustering of knowledge, the problem-solving approach, the scientific approach, and the striving to cognize the unknown.
The integrative approach necessitates that the educator integrate wide-ranging material to develop a wholesome or holistic view on a given phenomenon. For an education that is global in nature, it becomes essential, in addition to learning within the spectrum of the curriculum material, to acquire knowledge and information within knowledge-clusters, each representing an enlarged and, simultaneously, compact knowledge and information construct on a subsequent topic. The problem-solving approach is directed at providing students with challenging tasks, which enhances their global cognitive potential. This strategy is related with Leo Vygotsky’s idea about the zone of proximal development (Vygotsky, 1986; Vygotsky, 1991). The scientific approach entails that global information and knowledge educators recommend should be realistic and experimentally proven. Striving to cognize the unknown involves providing students with an impetus to exploring and learning about undiscovered and invisible realms on earth and beyond.

ATTITUDES, KNOWLEDGE, AND SKILLS

According to the DPMEE program, future students’ global competence encompasses attitudes, knowledge, and skills that they need to favorably and effectively function in a changing and interdependent society. Pre-service teachers are expected to possess attitudes that enable them to participate in solving vital problems challenging education and, in turn, to successfully develop school students’ global competency. A globally thinking university graduate should possess a positive and tolerant attitude to human diversity; a striving to enhance his or her global and multicultural horizons; a good understanding and acceptance of important humanistic and universal values and virtues; and an understanding of the notion of globalization and its relation to education.

Among other things, it is especially important for contemporary young people to possess negative attitude and be psychologically prepared to combat the global hazards such as war, arms race and terrorism; corruption; ethnocentrism and racism; gender inequity and violation of human rights; drug and alcohol abuse; tobacco smoking; sexual degradation and the spread of sexually transmitted diseases; trafficking of children and women for sexual exploitation and bonded labor.

Future teachers enrich their global competence by acquiring global knowledge base. First of all they enhance their global knowledge arsenal in the subject areas that they will be teaching while working at school. In addition, their global knowledge base is enriched by a range of themes, for instance, such as globalization and global society, world history, continents and oceans, world population, nations of the world, human diversity and change, man-made wonders, renowned personalities, health issues, world religions, international languages, energy resources, art and music, cinematography, secondary and higher education across continents, global threats to humanity and other issues. For example, future educators come to know about the creative biographies and exploits of famous and epoch-making educators such as Yan Amos Komensky (1592-1670), a Czech pedagogue who designed and implemented important didactic principles; Leo Vygotsky (1896-1934), a Russian educator and psychologist who inspired educators across the world with his socio-cultural cognitive theory of child development; and John Dewey (1859-1952), an American educator and philosopher who promoted the application of pragmatic principles in educational settings. One of the noted pedagogues of all time is Maria Montessori (1870-1952) who proposed to develop a child’s initiative by providing the liberty of internal development. Igniting and enhancing the innate intelligence of the child, the Montessori Method of Teaching is aimed at respecting the child. Today the advocates of Montessori approach to child rearing are numerous. The ideas she proposed and materials she developed are still used not only in specially organized Montessori classrooms. Throughout the world democratically thinking educators are on the way to implementing her ideas in classroom practice and in home schooling.
The would-be teachers studying at the Department enrich their global knowledge base by gaining insights into the fact that the languages currently spoken by a considerable number of people in the world are English, Spanish, Russian, French, German, Portuguese, Chinese, and Arabic. But the leading globally acclaimed language of today is English. The influence of English on education and on professional and personal activities of millions of people throughout the world is an objective and indisputable fact. This "linguistic expansion" has resulted from natural and objective geopolitical, economic, and socio-cultural factors (Crystal, 1997). A considerable number of English words and phrases continue to "penetrate" into the active vocabulary of almost all existing nations and ethnic groups whose native or official language is other than English. By doing so, English acquires, in each case, a peculiar pronunciation coloring. Some school- and university-age students in Russia use the speech units such as hi (a greeting), wow (an exclamation of joy and/or sudden delight), baby, music, drink, boyfriend, girlfriend, no problem, O.K., good bye, bye, all right, hello, thank you, present, girl, boy, hot dog, money, buck(s), very well, etc. Moreover, in the Russian language there are many borrowings from English denoting various aspects of information technology. The lexical units borrowed from English may be of a pure English origin; in other cases, the units, widely used in English and borrowed from it, may be primarily originated in another language. In turn, English borrows many words from other languages, thus enriching and beautifying its vocabulary and language use. In fulfilling this global function, English may “disseminate some borrowings” across the world, playing an intermediate role in spreading a certain vocabulary unit. Meriting attention are the words hamburger and kindergarten, which are of German origin. Owing to global English, these words have been spread across the globe (Sinagatullin, 2009; Sinagatullin, 2013). How proud and happy may be individuals of German origin when they hear these words somewhere in the United Kingdom, Portugal or Italy.

The Department faculty empowers future teachers to cognize the unknown. Future school teachers are enlightened to learn that all living and material entities are interconnected and intertwined on the surface of this planet. To know how to “reach” the unknown and yet-undiscovered domains of science and wisdom is a sacred mission of the generations to come. A school educator needs to be at the forefront in materializing this objective, for he is expected to be a conductor of erudition and enlightenment to growing generations. What is considered unknown and often mystic may represent bizarre phenomena today (owing to a lack of sufficient knowledge and more sophisticated and advanced technology), but may well be intelligibly and transparently explained tomorrow. Scientists have not yet provided comprehensive answers to the enigmas such as speculations about the origin of man; the existence of the monolithic constructions such as the pyramids at Giza, Stonehenge, and the sites at Baalbeck; references to vimanas (flying machines) in the ancient epics of India; hypotheses supporting the possibility of traveling through space at a speed faster than that of light. One of the historical puzzles is related to Atlantis, an allegedly once-flourishing civilizations, having almost completely perished thousands of years ago yet having given a new birth to contemporary racial and ethnic groups through those Atlanteans who could have survived the flood. Another enigma takes us to Nazca Plateau in Peru where one can distinctly see thousands of huge geometrical figures and animal patterns, but only from the air. Who created these drawings? What were the ancient people’s intentions of depicting them? These and tens of similar questions still remain not fully answered.

The DPMEE teaching staff is confident that a future teacher equipped with a global and frontier spirit must obtain and master specific skills enabling her or him to productively interact and function in an interdependent and multicultural world. The teacher needs to be skillful in interacting with colleagues and students from different socio-cultural and ethno-linguistic background within the borders of their country as well as in a more extended socio-geographic space.
The teaching staff develops would-be teachers’ skills of scientific research by supervising their term papers and final qualification (field) projects. Second-year students who are required to write term papers on pedagogy and fourth-years students who should write qualification projects for the completion of their four-year study at the university willingly select topics devoted to global and cross-cultural education. Some students opt for descriptive or theoretical projects, others prefer experimental topics. Students are encouraged to pick the most challenging topics. Students are recommended to select such themes as “The impact of globalization on contemporary education,” “The positive and negative influence of information technology on education in the era of globalization,” “Global threats and how they influence education,” Leo Tolstoy as a pedagogue and his educational legacy,” “Global vs. multicultural education: Common goals, content and ways of their implementation in secondary schools.”

CONCLUSION

The study has sought to show global education as a challenge of the contemporary era of globalization. The paper has attempted to place a special emphasis on the nature and principles of global education as well as on the global competence that contemporary higher school students are required to possess if they intend to become professionally qualified pedagogues. We have also drawn the readers’ attention to a paradigm of global education being elaborated at the Department of Pedagogy and Methods of Elementary Education.

Due to the efforts of the Department’s teaching staff, it has became possible, on a more effective basis, (1) to conceptualize and materialize the ideas of global education and related topics while preparing future teachers; (2) to assist schools, colleges and other higher institutions in developing their graduates with global and multicultural competency; (3) to monitor the research of post-graduate and doctoral students (they now possess a favorable environment and experimental sites in different types of educational institutions); (4) to organize joint pedagogical conferences and seminars; and (5) to publish books, periodicals and articles on different problems surrounding global education and related themes.

Socrates, a renowned Greek philosopher, once said, “I am not an Athenian, nor a Greek, but a citizen of the world.” Even though not all university graduates may acquire analogous endowment and qualities, nevertheless, I wish each one of them remembered, once in a while, this very saying, which may undoubtedly remind her or him that we, human beings, are all in the same boat called planet earth and that each individual needs to be prepared to make her or his own contribution to change the world for the better.
REFERENCES


ABOUT THE AUTHOR

Ilgiz M. Sinagatullin has had a thirty-six-year pedagogical career marked by a love for children and his profession. He received his doctorate in pedagogical sciences from Moscow Pedagogical State University. His name is gaining weight on the international level among teachers and teacher educators. He has traveled extensively on both sides of the Atlantic, studying the educational systems, making presentations, and sharing insights with educators, university faculty, and school students on various issues of educational theory and practice. His areas of research are global and multicultural education, teacher education for multicultural/bilingual settings, developing global competency of pre-service and in-service teachers, language policy in a globalizing and multicultural society, folk pedagogy, ethno-pedagogy, and ethno-psychology. He is the author of over 140 publications that saw the light in Russia, the United States, and the United Kingdom. Among his latest works are the books such as Constructing Multicultural Education in a Diverse Society (2003), The Impact of Globalization on Education (2006), Teaching is More Than Pedagogical Practice: Thirty-Three Strategies for Dealing with Contemporary Students (2009), and Fifteen Biggest Problems in Education and How to Solve Them (2013).

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11 Paper: Using Coaching and Ricoeur’s Hermeneutics within Higher Education of Veterans
Leeds Business School (UK)

• Nick Beech (N.Beech@leedsbeckett.ac.uk)

PURPOSE OF RESEARCH

Coaching has seen substantial development over recent years broadening its reach across diverse communities and enhancing the depth and rigour of its conceptual and theoretic content. Coaching within HE is commonly conceived as a means to providing personalised professional support to enable HE professional to reflect on enrich their practice, it can be seen that Ricoeur hermeneutics narrative identity can be used as a tool to gain greater insights in to people’s life journey and view of the world from which more informed engagement and development strategies can be devised.

In support of this journey this paper will employ Ricoeur’s hermeneutics approach to ‘narrative identity’ as a tool to explore the personal challenges and journey of veterans as they reflect and reassessing their personal identity through stories re-conceptualising themselves, their interactions and their civilian working environment. The methodology of using Ricoeur’s hermeneutics within HE research is explored.

Based on interventions with 5 coachees of varying military background, but with a minimum of 6 years veteran experience, provided an opportunity to explore their past and current perceptions of self, their experience of civilians and civilian life and the potential legacies and echoes of personal identity military service had endowed them. The work reinforced the value of Ricoeur’s self-reflexive approach with narrative mediating between two ‘poles’ of identity and the act of mimesis; prefiguration, configuration and refiguration as veterans see their world and their place within it. Using the veterans as a subject group the work sheds lights on to the benefits of this concept and how it can be used to provide a deeper understanding of the nature of such transitions and the complexities of the narratives of personal history as they shapes their interpretations of meaning and identify as the participant becomes both the seeker and what is sought.

METHODOLOGY

To fulfil the aims of this research an inductive phenomenological approach was adopted to explore the experience of veterans working in a civilian organisation (Husserl 1970) particularly relating to uncovering ‘hidden knowledge’ to see if veterans indicate that they feel engaged and that their skill and experience is valued with their civilian employment. Key within a phenomenological method is that it brings to the forefront the need to explore the experiences and perceptions of individuals from their own perspectives, and therefore attempts to avoid structuralist or normative perspectives with the aim to cut through the clutter of taken-for-granted assumptions. Here the aim is to retain accurate accounts of fact but also critique and reframe assumptions so as to provide insights from the different perspectives of people involved (Welman and Kruger, 1999). Therefore, the work focuses on gaining personal perspectives and interpretations of events employing qualitative methods of semi-structured interviews with veterans.

IMPACT/IMPLICATIONS FOR PRACTICE

Through Ricoeur’s hermeneutics approach it provides insights in to the nature and the power of personal identity. It further sheds light on to the challenges that some veterans face in transition in to a civilian life and raises the need for employers to be more aware of this anomaly.
FINDINGS/RESULTS

The work highlights the value Ricoeur’s hermeneutics approach to ‘narrative identity’ surfacing living identity and thereby providing deeper insights into the legacy of the past. The work shine a light on to how veterans orientation of self that still carry epistemological interpretation in part drawn from their past repertoire of historical resources based on the legacy of their military based fictive kinship. Further that these interpretations still resonate to different degrees does not leave them post service.

CONTRIBUTION

The works contribution is that is provides insights into the nature of the veterans’ story construction and how it shapes their interpretations of their current and future worlds. It also shed lights in to the nature of Ricoeur’s hermeneutics approach as a means of gaining greater understanding of the significance of surfacing narratives that underpin vivid plausible and desirable story based on the subjects past which can influence legacy of an individual’s living future.

KEY REFERENCES


12 Paper: Literature Review on Transcendental and Hermeneutic Phenomenology
Leeds Business School (UK)

- Christine Daley (C.Daley@leedsbeckett.ac.uk)

PURPOSE OF RESEARCH

For my doctorate in education I will be exploring the experiences of a group of students who are studying for a postgraduate diploma in Human Resource Management with membership of the Chartered Institute of Personnel and Development (CIPD), but who do not have an undergraduate degree. The research methodology I propose using is phenomenology so I have undertaken a literature review with the aim of providing a detailed understanding and appreciation of its appropriateness for my project. Phenomenology is a popular methodology in education, psychology, nursing and social science research.

METHODOLOGY

Initial research identified two main ‘schools’ of phenomenology. They are transcendental phenomenology (also known as pure, descriptive or Husserlian phenomenology or just phenomenology) and hermeneutic phenomenology (also known as interpretive, existential or Heideggerian phenomenology) respectively (Creswell, 2012). In the review the terms transcendental and hermeneutic were used throughout to differentiate between the two schools and thus avoid confusion.

The literature review comprised an exploration of both schools of phenomenology and was undertaken in a systematic manner. First came an examination of explanatory literature covering the origins, key concepts and frameworks employed. This was followed by a review of practitioner authored papers on the application of the two phenomenological research methodologies, in order to help evaluate the suitability of each to the doctoral project.

FINDINGS/ RESULTS

There are key methodological differences between transcendental phenomenology and hermeneutic phenomenology. In transcendental phenomenological research, the objective is to be descriptive, focusing on the structure of experience and the principles that give meaning to the life world. In hermeneutic phenomenological research, the objective is to be interpretive and to focus on the historic meanings of experience and their developmental and cumulative effects (Creswell, 2012).

In transcendental phenomenology, to capture the essence of the lived experience and to subsequently describe it, the researcher must achieve the state of mental isolation known as the Epoche. The concept of Epoche is irrelevant to hermeneutic phenomenology, where the researcher’s aim is to use prior knowledge and experience to interpret the data through the medium of the hermeneutic cycle (Heidegger, 1962; Gadamer 1976; van Manen 1990; Laverty 2003; Finlay 2008; Tuohy et al 2013).

The focus on interpretation in hermeneutic phenomenology is significant. Interpretation brings meaning and (although it will be beyond the scope of the doctoral thesis) meaning may then lead to action; if we better understand the situation of the participants in the research project, then we may be able to improve it. Reflexivity is identified as a key skills to aid this interpretative process (Sloan and Bowe, 2014).
Phenomenology is a methodological broad church. Whilst the researcher may lean towards the transcendental or hermeneutic approach, neither is dogmatic and there is scope for individualisation both to the context and to the preference of the researcher (Gadamer, 1986; van Manen 1990; Allen, 1995).

IMPACT/IMPLICATIONS FOR PRACTICE

In the context of the study, the main reservation about transcendental phenomenology relates to the Epoche and to the attendant concept of bracketing out. Can the necessary state of detachment could be achieved by the insider researcher? Hermeneutic phenomenology with its focus on interpretation would appear more appropriate. However due caution is required as there is the risk of becoming ‘bogged down’ in the data and losing all sense of meaning (Laverty, 2003). To counter this, the researcher must acquire the skills of reflexivity utilised by Sloan and Bowe (2014).

CONTRIBUTION

Reviewing literature on phenomenology and phenomenological research methodologies helped inform the decision on suitability for the doctoral thesis and could serve the same purpose for other scholars embarking on research projects of this and other magnitudes.

KEY REFERENCES


13 Paper: A review of the internationalisation of higher education literature: a UK perspective
Leeds Business School (UK)

- Helen Thompson (H.Thompson@leedsbeckett.ac.uk)

PURPOSE OF RESEARCH

The aim of this paper is to provide an overview of the existing internationalisation of higher education literature and in so doing explore; what is meant by the term; developments over the last two decades; national and institutional strategies and factors impacting on them. By so doing the paper seeks to both provide a summary of the current internationalisation of HE landscape, identify trends and clarify some of the terminology found in this field.

METHODOLOGY

The review of the literature is being undertaken as part of the literature review for a PhD on the impact of the internationalisation of HE on domestic students who ‘receive’ international students.

As Kehm and Teichler (2007) highlight in their review of the literature that the existing literature on the internationalisation of HE ‘is somewhat fuzzy ... and therefore cannot easily be addressed through the typical strategies of literature research.’ P261. Therefore the starting point was to review all issues of the Journal of Studies in International Education from its initial publication in 1997 to present and identify the most relevant articles. The research then widened to include further articles cited within those articles which had been deemed to be relevant by the author. The Journal of Studies in International Education was selected because as Kehm and Teichler point out this journal ‘has been a mirror of the diversity of themes, concepts, and findings relevant to understanding international aspects in higher education.’ P269 and also it has been in publication throughout the period on which this study is focused.

IMPACT/ IMPLICATIONS FOR PRACTICE

This review should highlight current trends in the internationalisation of HE which may impact on the management of university departments and/or classroom practice.

CONTRIBUTION

Though written from a UK perspective all practitioners should benefit from this paper as it should provide them with a relatively up to date overview of the current position of HE internationalisation as well as clarifying some of the terminology found in this field.

KEY REFERENCES


This project considers the experience of HR professionals and aspiring HR professionals from public, private and the third/voluntary sectors of understanding a complex construct, employee engagement, within a higher education business programme. In order to consider experiences that individuals shared in order to gain understanding of this complex construct a phenomenographic approach was used. Employee Engagement has developed from different disciplines and is still in flux concerning what it actually means whilst at the same time organisations are very busy measuring it. What exactly? Are they measuring? Research has blossomed over the last 20 years and has different emphases and links with quite a number of literatures such as burnout, meaningfulness, job design employer relations, motivation, commitment and well-being. The construct of engagement was first put forward by Kahn which he described as “the harnessing of organization members’ selves to their work roles, in engagement, people employ and express themselves physically, cognitively and emotionally during role performances” (Kahn 1990 p694). The results of this study provide insight into the way individuals experience engagement.

1 EMPLOYEE ENGAGEMENT

Employee Engagement research has blossomed over the last 20 years and has different theoretical perspectives depending on which discipline the research is positioned in as it has grown out of different areas of research; burnout, meaningfulness, job design, employer relations, motivation and commitment and more recently well-being. The construct of employee engagement was first put forward by Kahn which he described as personal engagement; “the harnessing of organization members' selves to their work roles; in engagement, people employ and express themselves physically, cognitively, and emotionally during role performances.” (Kahn 1990, p. 694). This is from the psychological discipline where along with burnout and well-being the main work on engagement is derived. However, there is also a strong contender in the employer relations discipline as the psychological contract, working relationship with employers and work stress literatures show. With origins in psychology and employer relations there has been a business practitioner thrust that has led the way with lots of ‘how to’ studies, putting engagement into practice and attempting to measure it. With the construct being a factor for studies in organisational behaviour, organisational development, citizenship behaviours, and HRD, academic debates are thriving on the different components of engagement, its antecedents and implications. Schaufeli et al define engagement “as a positive, fulfilling, work-related state of mind that is characterized by vigor, dedication, and absorption”, with the idea that the individual is so absorbed in the work that time flies. (Schaufeli et al, 2002, p. 74). Truss and colleagues emphasise a positive state of mind and willing effort in their definition: “being positively present during the performance of work by willingly contributing intellectual effort, experiencing positive emotions and meaningful connections to others.” (Truss et al., 2006).
The construct is seen to relate to the constructs of ‘work engagement’, ‘organisational commitment’, ‘job satisfaction’ and ‘organisational commitment behaviours’. Saks (2006) and Robinson et al (2004), however, both argue that engagement is different to all of these other constructs. Commitment usually means an individual’s attachment and obligation to the organisation (Allen and Meyer, 1990) so the term commitment is usually meaning ‘organisational commitment’ which is specific to the organisation and not the work or the role, although of course, these should, in theory, at least be leading one to the other.

Work engagement is narrower than employee engagement but then a definition of work would be required to show the extent of the difference. The term employee in employee engagement is highlighting the person and the act of being engaged rather than a relationship with the organisation or the job. However, with employee engagement seen both a ‘state’ of ‘being’ engaged having influences and antecedents and a process of ‘engaging’ the construct still lacks clarity.

In addition to academic research there has been an explosion of work within industry where surveys, tools, strategies and interventions abound all under the name of employee engagement. Practitioners do not necessarily align with academics in their theoretical understanding of engagement but have a wealth of experience of working with the construct as they find useful. Studies that have created interest in employee engagement are those that support the notion that engagement leads to higher productivity (Gruman and Saks, 2011) and leads to discretionary effort, innovation, customer loyalty, quality, profitability, earnings per share and productivity (Blessingwhite, 2008). It is agreed that organisations want their employees to be engaged. ‘Engage for Success’, the movement led by David MacLeod and Nita Clarke, deliberately does not define employee engagement and instead encourages organisations to define it for themselves. Since engagement has so many factors affecting it then this confinement to one context is perhaps what academic researchers should also be considering when trying to understand what it means.

2 PURPOSE

The purpose of this research is to understand how HR professionals and aspiring professionals from a wide number of countries within Europe and Internationally, and from different sectors; conceptualise, understand and experience employee engagement within the learning context of a higher education programme. The aim is that this data along with the theoretical work in the academic literature will work together to bring about dialogue between practitioner work and academic work.

RESEARCH QUESTION

The research question can be summed up as:

What do we understand about the construct of Employee Engagement from multiple experiential perspectives?
3 METHODOLOGY

A phenomenographic approach was used. This was first devised by Ference Marton from Sweden in 1981. Phenomenography is an approach which aims at understanding different ways in which people conceptualise, perceive, understand and experience a phenomenon. The intention of the approach is to identify multiple conceptualisations or meanings that are in use by different people. By understanding different views, ideas, understanding and experiences that people have of employee engagement an inclusive process can be more easily developed for learning about it. The ontological assumptions of phenomenography are subjectivist in that people construct their meaning of the world in different ways. People will construct employee engagement differently and seeing the variety of these differences can help understanding of the construct. Phenomenography collects data from people and is interested in understanding the experience and perceptions they have of the phenomena – which in this paper is employee engagement and learning about employee engagement. The aim is to explore the relationship between the individuals and employee engagement and the sharing about employee engagement with each other with the aim of learning more about it. The context is therefore one of learning and development. In this paper the phenomenon is employee engagement, the context is learning and development and the focus is human experience. The process is description of experience, analysis and understanding of experience. It is a helpful approach to develop a collective experience of a group of individuals and see the variety in experience.

3.1 DATA COLLECTION

The data itself is the experience of HR professionals (European and UK) and aspiring HR professionals (International, European and UK) from public, private and the third/voluntary sectors as they consider the construct of employee engagement through a higher education programme. The data collection emphasises description of experience. A ‘conception’, the basic unit of description in phenomenographic research, has been called various names, such as ‘ways of conceptualizing’, ‘ways of experiencing’, ‘ways of seeing’, ‘ways of apprehending’, ‘ways of understanding’, and so on. (Marton and Pong 2005, p336)

At the beginning of the session all participants were asked permission to collect the data that was created by the class. It was data that was shared for the whole class to use.

Participants were asked what concepts/constructs/terms were used in their organisations which encompassed the meaning of engagement. They shared these in small groups and then all the terms were collated on a whiteboard. For each of the 4 classes this resulted in about 40 terms. These were photographed - see Figure 1 for an example. Some terms were common across all 4 classes – these are shown in Figure 2.
Examples of Terms Used for Engaged/Engagement

<table>
<thead>
<tr>
<th>Motivated/motivation</th>
<th>Aligned/alignment with organisation</th>
<th>‘well’/well-being</th>
</tr>
</thead>
<tbody>
<tr>
<td>Involved/involvement</td>
<td>Trusted/trust</td>
<td>Positive attitude</td>
</tr>
<tr>
<td>Loyal/loyalty</td>
<td>psychological contract</td>
<td>Dedicated/dedication</td>
</tr>
<tr>
<td>Satisfied/satisfaction</td>
<td>‘good’ citizenship</td>
<td>Appreciated</td>
</tr>
<tr>
<td>Committed</td>
<td>Empowered</td>
<td>Respected</td>
</tr>
<tr>
<td>Valued</td>
<td>Having ‘voice’</td>
<td>Being Connected</td>
</tr>
<tr>
<td>Dialogue/Understood</td>
<td>Inter-dependence</td>
<td>Being Consulted</td>
</tr>
<tr>
<td>Being present</td>
<td></td>
<td>Recognised</td>
</tr>
</tbody>
</table>

Going extra mile

**Figure 2: Common Terms Used for Engaged/Engagement**

The next stage was for the participants, in their small groups, to take a term from the board and place it in contraposition with the term engagement and then discuss any experiences that related to this statement. Below Figure 3 shows examples of this.
Example of Contrapositioned Discussion Statements

motivated but not engaged
involved but not engaged
loyal but not engaged
satisfied but not engaged
committed but not engaged
valued but not engaged
trusted but not engaged
understood but not engagement
appreciated but not engaged
respected but not engaged
trusted but not engaged

Figure 3: Examples of Contrapositioned Discussion Statements

In small groups and in the whole class individuals shared experiences where a contrapositioned statement had been a reality for them. The comments provided in these examples were noted and became the data.

4 DATA ANALYSIS

Using the comments as data - descriptive categories were developed through an iterative process of adding data to categories and merging, amalgamating, separating and expanding categories as the data is brought into the analysis. Description is important because similarities and differences in what people describe as their experience can be compared. The aim was for me to understand the variety of different ways people experienced engagement.

5 RESULTS

Often they could list several of the generated list together eg I am motivated, I work all hours and I am committed to my job but I feel totally disengaged and I am currently looking for another job”. Another example is someone experiencing being “loyal, committed, motivated, satisfied, involved, aligned, ‘going the extra mile’, giving 110%, being trusted and still being disengaged”. In fact, there was no shortage of being able to share similar experiences.

There were only two words generated, across all 5 occasions, that could not be comfortable contrapositioned with engagement and these were ‘being valued’ and ‘being appreciated’.

It was found that the ‘being’ and the ‘feeling’ made quite a difference in terms of experience. ‘Being’ took on the more behavioural aspects of engagement while ‘feeling’ was considered a deeper level or higher order way of working.
An area that was easy to differentiate was the focus of the engagement. There were many examples of experiences of being engaged in one sphere but not another eg engaged with a patient but not with the organisational processes. Five spheres of engagement emerged. The five spheres were: engagement with the job, engagement with the stakeholders (customer/service user/supplier etc), engagement with the immediate team, engagement with the organization and engagement with the profession.

Other results were that:

a) Individuals experiences were very much rooted in where they were when embarked on the study of employee engagement – that is when they became aware it was a construct they were interested in.

b) That every participant could provide an experience of when they were engaged and when they were not engaged and this was sometimes about ‘being’ which was behavioural and sometimes about ‘feeling’ which was a deeper sense of knowing.

c) That every participant had experienced factors they would consider were engagement at the same time as considering themselves as disengaged.

d) That for every term used for engagement, except being valued and being appreciated could elicit experience to evidence the terms could be opposed.

e) That engagement and disengagement (or not engaged) are not on the same continuum.

f) That engagement comprises some or all the terms considered but that individually the terms can all (except the two mentioned) exist alongside the opposite of engagement which they are supposed to be representing.

g) due to the complexity of its origins in academic disciplines; its multifaceted nature in terms of intellectual, emotional and behavioural layers; its ability to be an agent and an outcome at the same time; it popularity in the international business world for its associated benefits and application to almost every human activity, engagement is likely to continue to evolve in ever increasing ways.

How people experience engagement is crucial as we want them to experience it. We also want to know how to find this out when surveys are so mechanistic and may be measuring the wrong thing. If there are clearly different spheres for engagement then at least survey questions and other measurement techniques can be more intelligent in what they are asking.

It was clear from this research so far that people understand their own concept of engagement that is personal to them and perhaps this is the answer – being more individually focussed in the workplace.
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