Photo by Kyle Glenn on Unsplash

The Global 'Market' and Micro-credentials: Untangling a Twisted Story

NIDL
National Institute for Digital Learning

CEDEFOP | European Centre for the Development of Vocational Training

@mbrownz

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Dublin City University

26th November 2021

Outline…

- Whose market?

- For what purpose?

- To achieve what outcomes?

State of the Art Literature Review on Micro-credentials

Research Question	Thematic Focus				
	Why	What	Who	How	Where
1. What is the problem that micro-credentials are seeking to address?	■	■			
2. What are the underlying drivers and attractors of the micro-credential movement?	■	■			
3. How are micro-credentials being positioned within the credential ecology?		■		■	
4. How are different stakeholders responding to the micro-credentials movement?			■	■	
5. What are the main benefits arising from the development of micro-credentials?	■		■		■
6. What are the benefits of adopting a European-wide approach to micro-credentials?	■		■		■
7. What are the major barriers for the successful implementation of micro-credentials?				■	■
8. What are the major enablers for the successful implementation of micro-credentials?				■	■
9. What evidence is there that further development of micro-credentials will contribute to a more future-fit education system?				■	■
10. What evidence is there that further investment in micro-credentials will contribute to tangible individual and societal benefits?			■		■

European Commission

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"You have to trace the thread…

…to untangle the knot"

1. Whose market?

HOLONIQ. **GLOBAL ONLINE DEGREE & MICROCREDENTIAL MARKET**

Holon IQ

$117B Online Degree & Micro-Credential Market in 2025

Global Online Degree and Micro-Credential Expenditure Forecast in USD

UPDATED 'MID COVID' FORECAST 17% CAGR
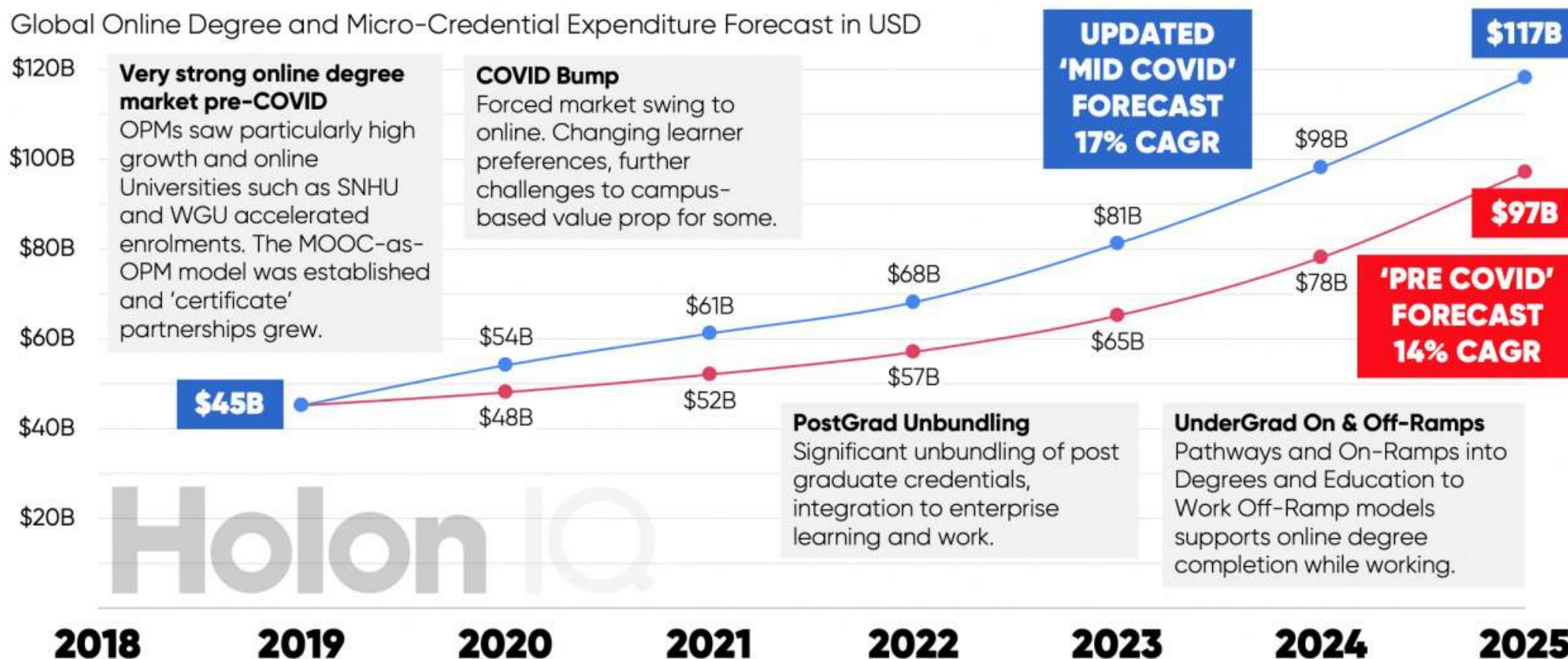
$117B

Very strong online degree market pre-COVID
OPMs saw particularly high growth and online Universities such as SNHU and WGU accelerated enrolments. The MOOC-as-OPM model was established and 'certificate' partnerships grew.

COVID Bump
Forced market swing to online. Changing learner preferences, further challenges to campus-based value prop for some.

$98B

$97B

$81B

'PRE COVID' FORECAST 14% CAGR

$68B

$61B

$78B

$54B

$65B

$57B

$45B

$52B

$48B

PostGrad Unbundling
Significant unbundling of post graduate credentials, integration to enterprise learning and work.

UnderGrad On & Off-Ramps
Pathways and On-Ramps into Degrees and Education to Work Off-Ramp models supports online degree completion while working.

Holon IQ

$120B
$100B
$80B
$60B
$40B
$20B

2018   2019   2020   2021   2022   2023   2024   2025

OECD, 2021a

Figure 11. Number of micro-credentials offered on selected learning platforms, and one-year percentage change

Increasing Supply
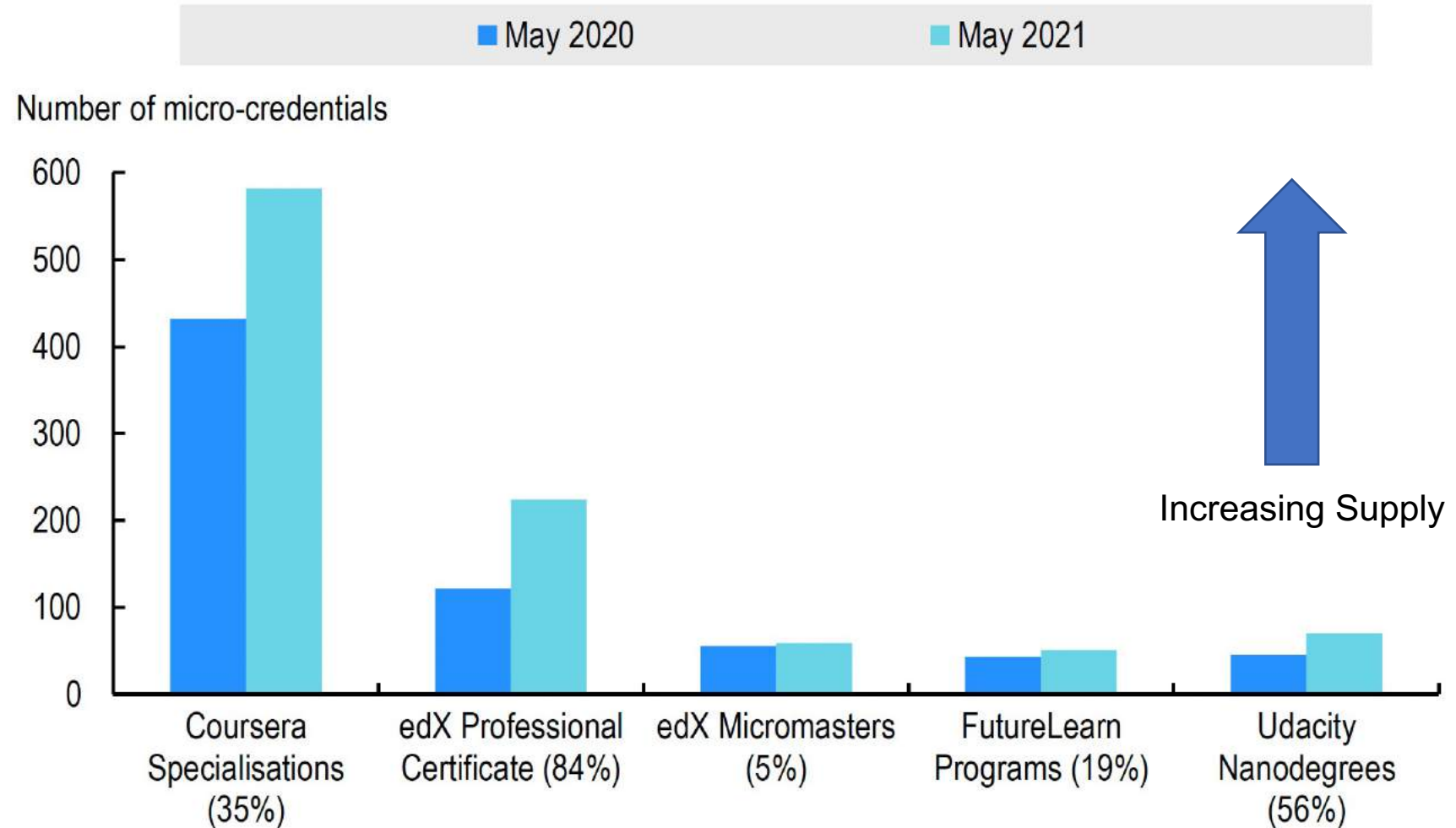
Marketplace for online microcredentials

The Hon Dan Tehan MP
Minister for Education

Senator the Hon Michaelia Cash
Minister for Employment, Skills, Small and Family Business

Australian government to build AU$4.3 million online microcredentials marketplace

The Morrison Government will provide $4.3 million to build and run a one-stop-shop for microcredentials to help students identify educational opportunities.

The marketplace builds on the success of the Government's microcredential initiative announced as part of its Higher Education Relief Package at Easter. Since the announcement, 54 providers have created 344 short online courses in areas of skills shortage.

MicroCreds

MICRO CREDS

Twitter: @IUAMicroCreds   LinkedIn: @MicroCreds   #MicroCredsIE

MicroCreds is an ambitious 5-year, €12.3 million project (2020-2025) led by the IUA in partnership with seven IUA universities: Dublin City University, Trinity College Dublin, Maynooth University, NUI Galway, University College Cork, University College Dublin and University of Limerick. The project funding was awarded following a competitive process under the Department of Further and Higher Education, Research, Innovation and Science's (DFHERIS) Human Capital Initiative Pillar 3 Innovation and Agility, with funding drawn from the National Training Fund.

OUR WORK

Access

DARE & HEAR

Mature Students

Further Education &

Gig qualifications for the gig economy: micro-credentials and the 'hungry mile'

Leesa Wheelahan[1] • Gavin Moodie[1]

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Abstract

This paper argues that micro-credentials are gig credentials for the gig economy. Micro-credentials are short competency-based industry-aligned units of learning, while the gig economy comprises contingent work by individual 'suppliers'. Both can be facilitated by (often the same) digital platforms, and both are underpinned by social relations of precariousness in the labour market and in society. They are mutually reinforcing and each has the potential to amplify the other. Rather than presenting new opportunities for social inclusion and access to education, they contribute to the privatisation of education by unbundling the curriculum and blurring the line between public and private provision in higher education. They accelerate the transfer of the costs of employment preparation, induction, and progression from governments and employers to individuals. Micro-credentials contribute to 'disciplining' higher education in two ways: first by building tighter links between higher education and workplace requirements (rather than whole occupations), and through ensuring universities are more 'responsive' to employer demands in a competitive market crowded with other types of providers. Instead of micro-credentials, progressive, democratic societies should seek to ensure that all members of society have access to a meaningful qualification that has value in the labour market and in society more broadly, and as a bridge to further education. This is a broader vision of education in which the purpose of education is to prepare individuals to live lives they have reason to value, and not just in the specifics required of particular jobs.

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> "Rather than presenting new opportunities for social inclusion and access to education, they contribute to the privatisation of education by unbundling the curriculum and blurring the line between public and private provision in higher education" (p.14).

2. For what purpose?

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NEWS
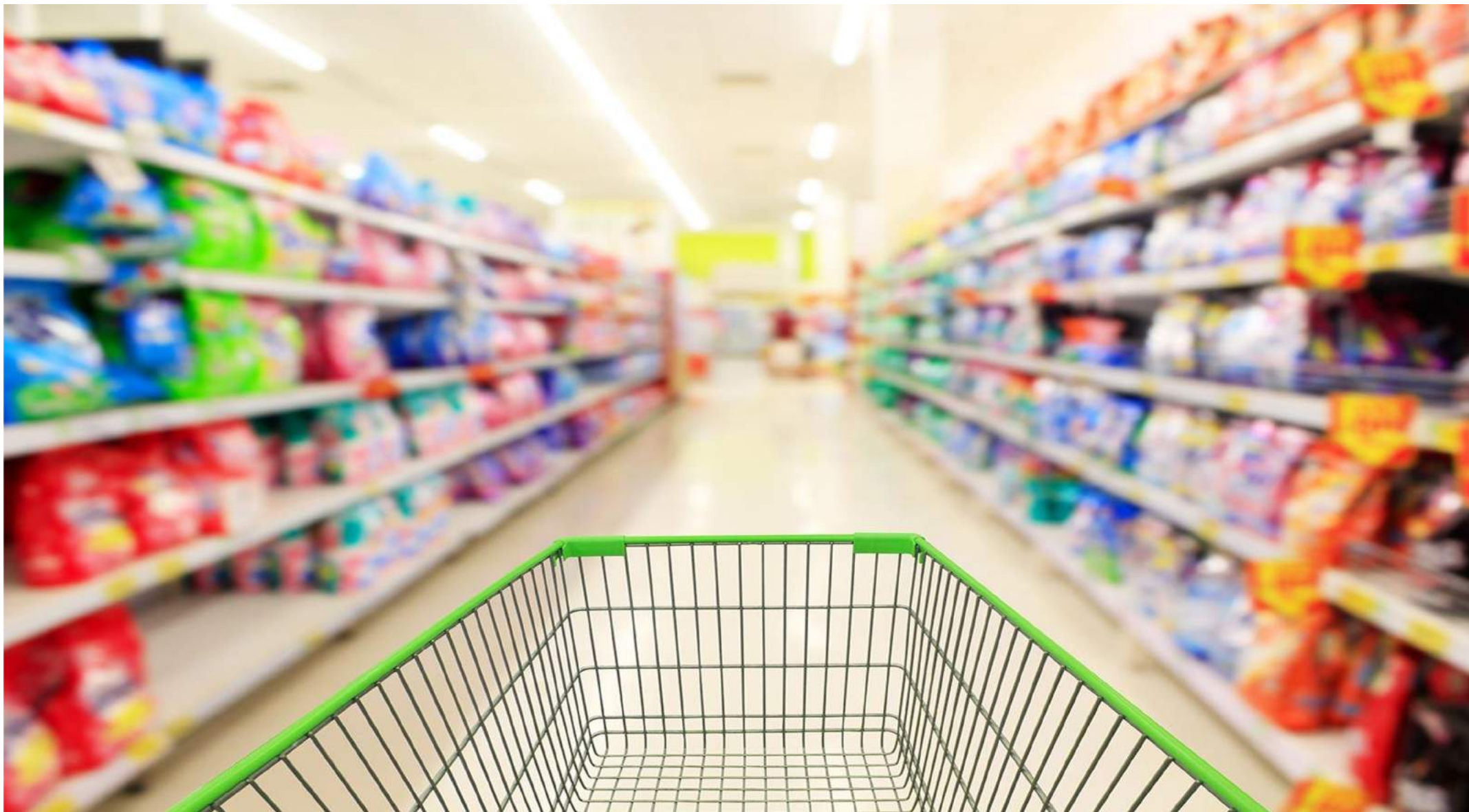
Urgency of getting people back to work gives new momentum to "microcredentials"

Americans seek educations that take months, not years, to help them find new jobs fast

by **JON MARCUS**   June 2, 2020

Google Ireland will offer 1,000 scholarships for Dublin jobseekers

by Blathnaid O'Dea ● 1 DAY AGO

The courses, designed by Coursera, include IT, data analytics, project management and UX design.

Google Ireland said it will provide 1,000 scholarships for Dublin jobseekers in partnership with City of Dublin Education and Training Board (ETB).

The course certificates will be distributed through the City of Dublin Education and Training Board in collaboration with St Andrew's Local Employment Services, and will be recognised by industry experts and employers, including Google.

Looking for jobs in tech or science?

Check out top employers hiring right now ⊗

Shane Nolan, managing director for new business at Google Ireland, said technology has been a lifeline during the pandemic. "From businesses starting to sell their products online and remote working, to helping us all stay connected," he said.

Google launches training initiative for Dublin job seekers

Image: Stockfresh

Certificates distributed through the City of Dublin Education and Training Board

September 2021 - $5.6m

500,000 Canadians annually seek to complete St. John's certificates

Since 1833

Micro-credentials: huge and hiding in plain sight
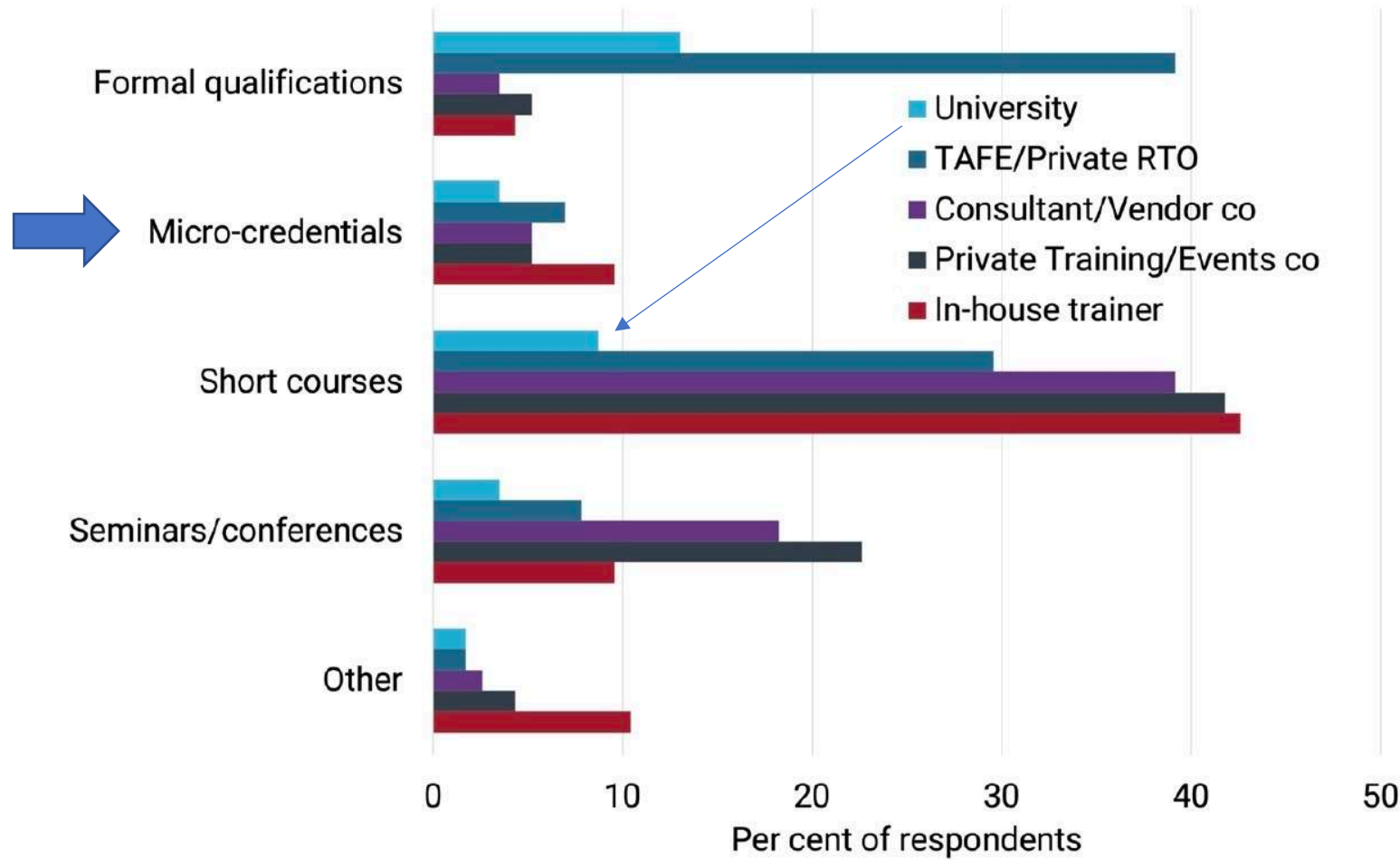
June 4, 2021

They are already big in training

In 2019, there were **2.6m people enrolled** in non-qualification "training bundles" – mainly to meet **regulatory requirements in safety and skills maintenance**.

In a report for the estimable **National Centre for Vocational Education Research, Bryan Palmer** suggests that while only are few are "recognised as a VET skill set, it would appear that industry actors and/or individual students already see many of these bundles as a 'credential' of value, one for which they are willing to pay," – 93 per cent are fee for service.

And all is largely well, with the market "operating effectively" and **meeting regulatory and safety requirements**.

CHART 6: Types of training and provider to be used over the next 12 months

(The Australian Industry Group, 2021)

Legend:
- University
- TAFE/Private RTO
- Consultant/Vendor co
- Private Training/Events co
- In-house trainer

Categories (y-axis): Formal qualifications, Micro-credentials, Short courses, Seminars/conferences, Other

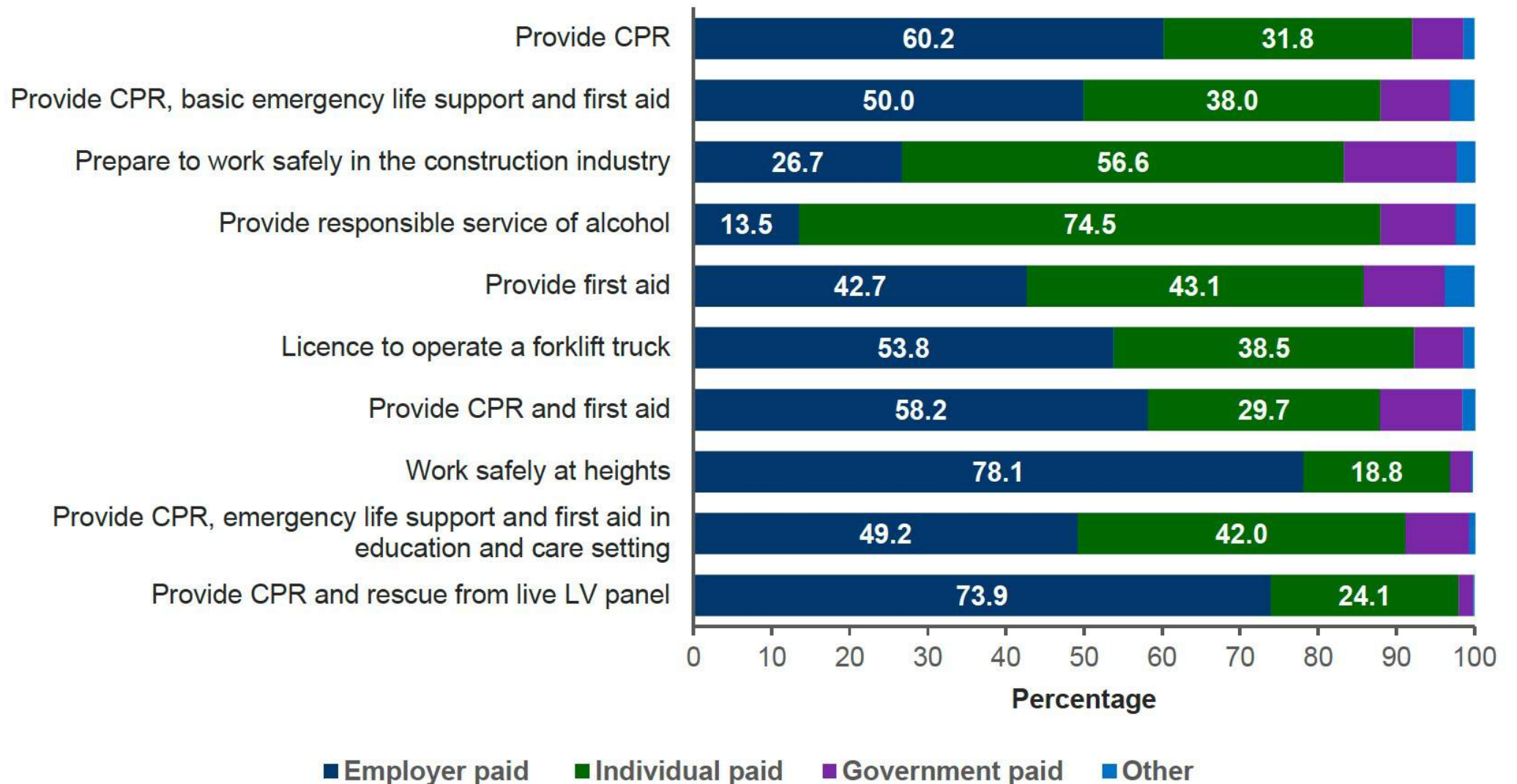X-axis: Per cent of respondents (0, 10, 20, 30, 40, 50)

Few companies indicate an interest in accessing micro-credentials as part of their employee training and development.

Skills urgency
Transforming Australia's workplaces
APRIL 2021

Level of interest in micro-credentials for employee training and development

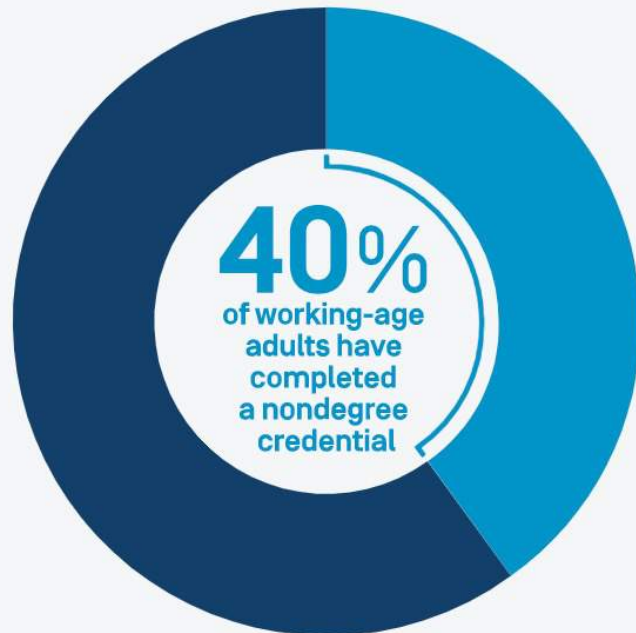**Figure 5 Distribution of who pays for the top 10 subject bundles, 2019 (%)**

Subject bundle	Employer paid	Individual paid
Provide CPR	60.2	31.8
Provide CPR, basic emergency life support and first aid	50.0	38.0
Prepare to work safely in the construction industry	26.7	56.6
Provide responsible service of alcohol	13.5	74.5
Provide first aid	42.7	43.1
Licence to operate a forklift truck	53.8	38.5
Provide CPR and first aid	58.2	29.7
Work safely at heights	78.1	18.8
Provide CPR, emergency life support and first aid in education and care setting	49.2	42.0
Provide CPR and rescue from live LV panel	73.9	24.1

Percentage

■ Employer paid ■ Individual paid ■ Government paid ■ Other

Examining the Value of Nondegree Credentials

July 28, 2021

(Hansen, 2021)

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Nondegree credential attainment

40% of working-age adults have completed a nondegree credential

Issuers of nondegree credentials

- 9% Other
- 19% Vocational/technical college
- 10% Business/company
- 18% College/university
- 12% Community college
- 17% Government
- 15% Professional association
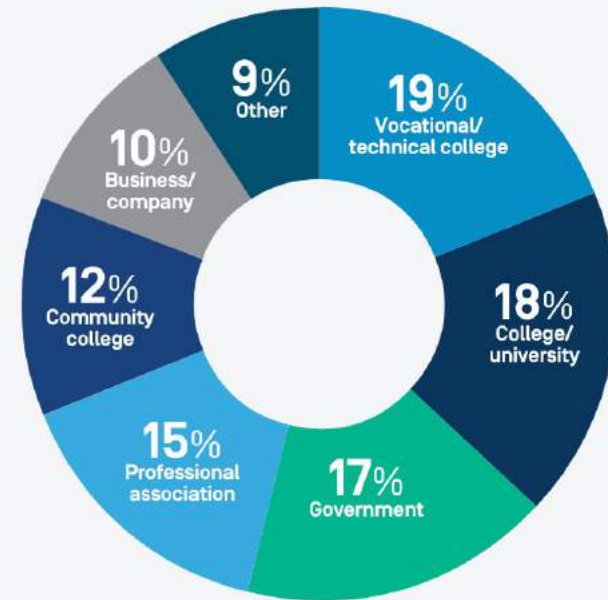
The institutions that issue nondegree credentials are diverse

Distribution of publications by focus or sector

Sector	All publications		Highly Relevant	
	n	%	n	%
Higher Education	126	85.1	42	93.3
Vocational and Further Education and Training	42	28.4	12	26.7
Industry / Corporate	26	17.6	15	33.3
MOOC Sector	15	10.1	6	13.3
Community Organisation	2	1.4	1	2.2
K-12 Schools	8	5.4	0	0.0
Employers (i.e., recruitment, training, etc.)	15	10.1	9	20.0
Employees (i.e, CPD, career benefits, etc.)	15	10.1	7	15.6
Societal (i.e., future private and public benefits)	11	7.4	8	17.8
Cross-sector	8	5.4	7	15.6
Other	1	0.7	0	0.0

HEIs

VET

Employers
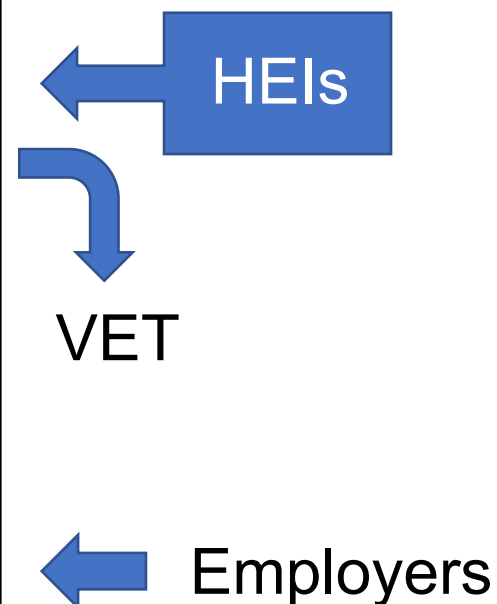
Sheepskin Effect

3. To achieve what outcomes?

Drivers and Attractors for Micro-credentials

	All Publications		Highly Relevant	
	n	%	n	%
Increase employability	94	63.5	38	84.4
Support CPD and workplace training	88	59.5	28	62.2
Increase flexibility for learning	80	54.1	34	75.6
Close skills gaps in response to changing nature of work	74	50.0	32	71.1
Promote lifelong learning	71	48.0	30	66.7
Develop 21st Century transversal skills	50	33.8	23	51.1
Develop a new 21st Century credential ecology	35	23.6	22	48.9
Increase access and pathways to formal education	30	20.3	17	37.8
Support new models of pedagogy	27	18.2	12	26.7
Respond to COVID crisis	23	15.5	14	31.1
Reflects Neo-liberal market forces	22	14.9	5	11.1
Test innovations and trigger changes	13	8.8	6	13.3
Reduce costs of education and training	12	8.1	5	11.1
Increase equity for under-represented groups	12	8.1	6	13.3

65%
Employability

48%
Lifelong Learning

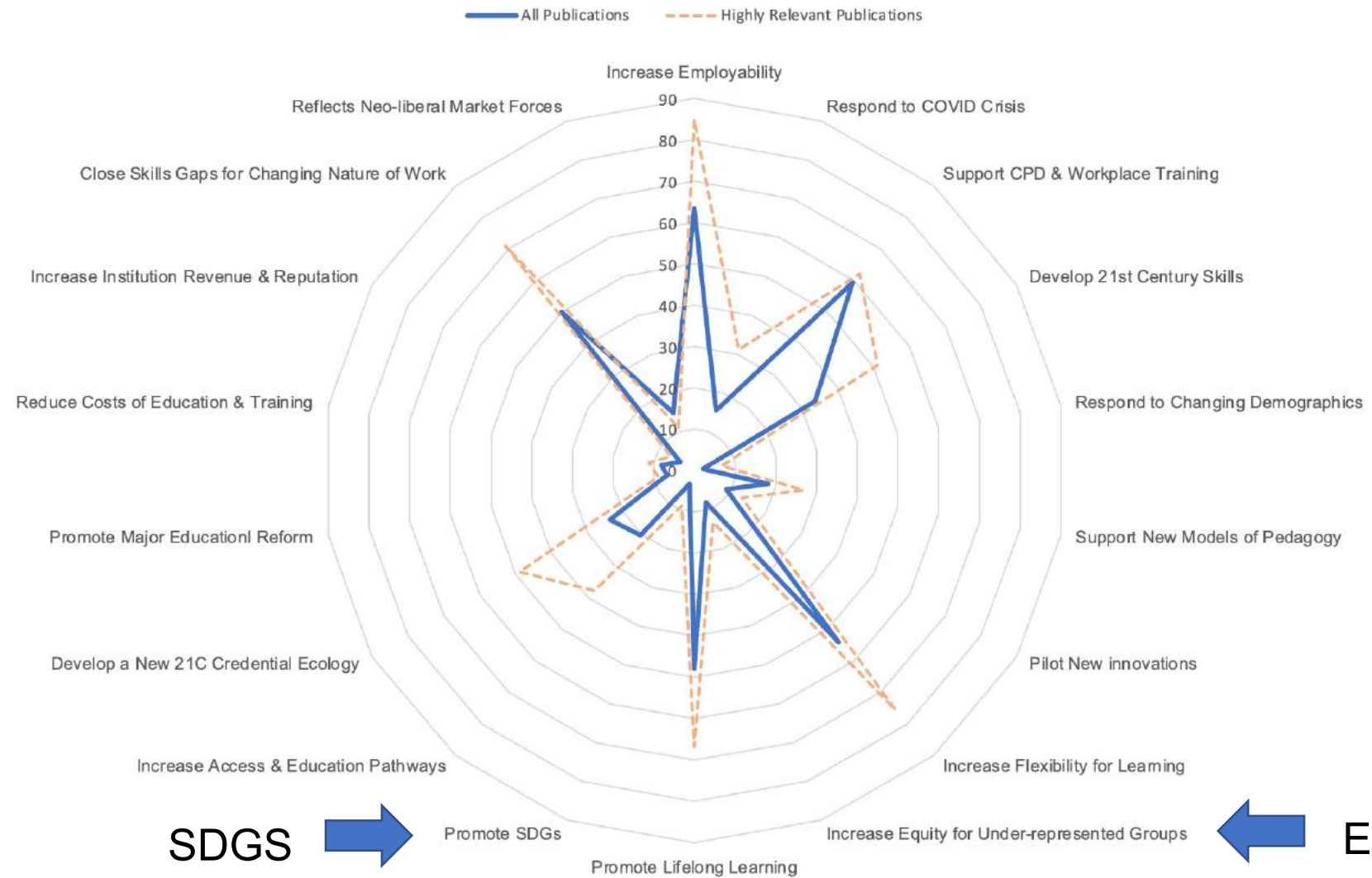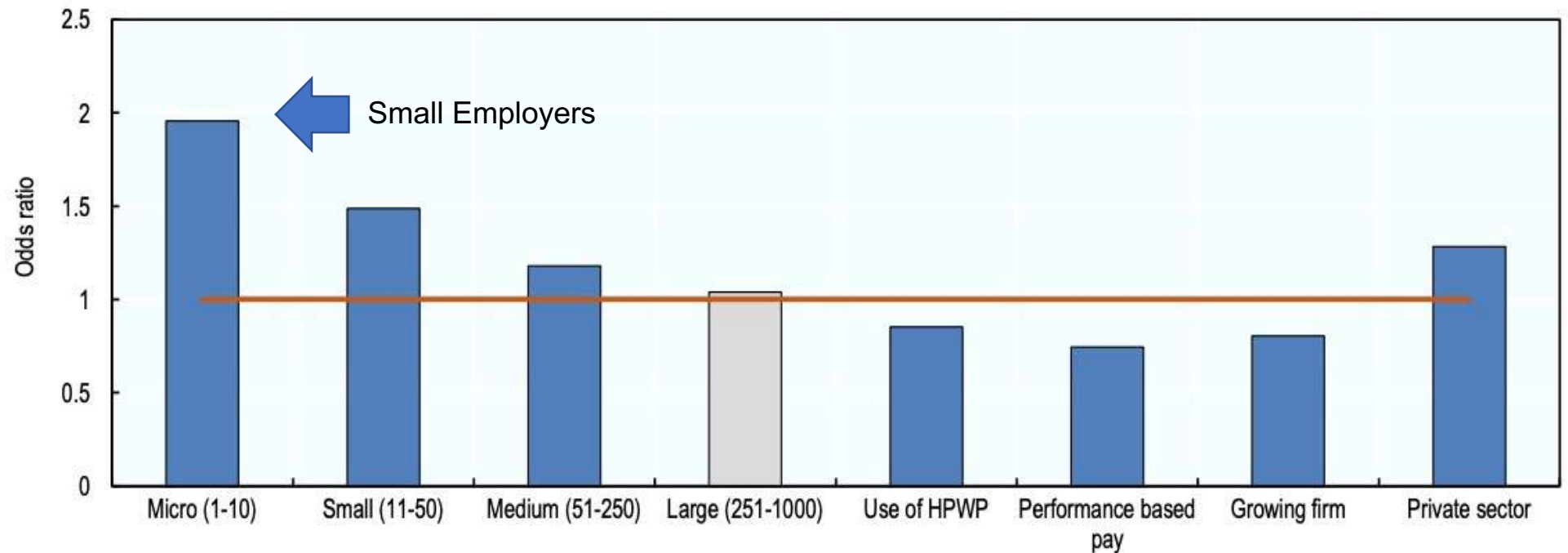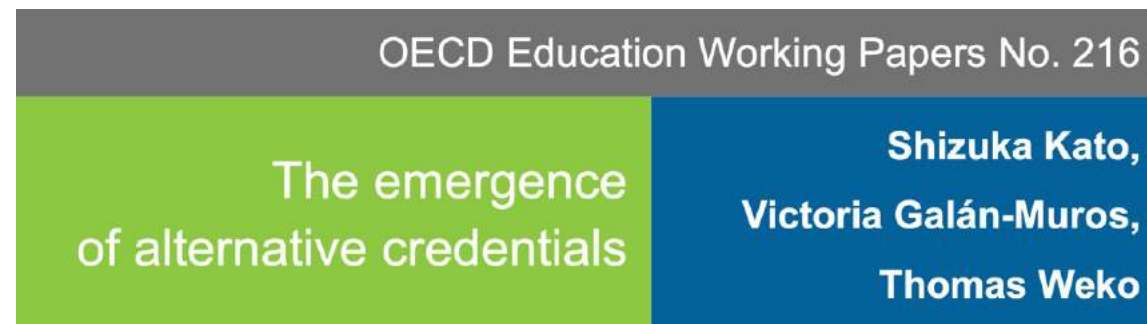Drivers and Attractors for Micro-credentials

Figure 4.6. Employer characteristics related to workers' likelihood of being disengaged from available adult learning

Logit regression odds ratios

"Because **alternative credentials** are **not identified** in the **educational attainment** component of national labour force surveys or in international surveys of adult skills… **evidence** on their **effects** on earnings of **large-scale populations** is **unavailable**"

(Kato, Galán-Muros & Weko, 2020, p.28).

OECD Education Working Papers No. 216

The emergence of alternative credentials

Shizuka Kato,
Victoria Galán-Muros,
Thomas Weko

Final remark…

Photo by Pascal van de Vendel on Unsplash

"I love a good plot twist"

https://www.dcu.ie/nidl

Thank you

Go raibh maith agaibh!

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Ollscoil Chathair
Bhaile Átha Cliath
Dublin City University

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