

Methodology Definition Report

Deliverable 2.1



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This report has been published with the financial support of the European Commission.

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Grant Agreement	ERASMUS-EDU-2022-PI-ALL-INNO - Blueprint for Sectoral Cooperation on Skills
Project	101111846 – ESIC
Project Title	Alliance Fostering Skills Development for Social Economy – European Social Innovation Campus
Coordinator	DI AK – Diaconia University of Applied Sciences
Deliverable	D2.1 – Methodology Definition Report
Dissemination Level	Public

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Last revision: 15/01/2026

Please use this reference to cite the report: Eiselein, P., Oers, B., Couckuyt, D. "Methodology Definition Report". January, 2026. Odisee University of Applied Sciences.



Executive Summary

This deliverable (D2.1) defines the methodological foundation of Work Package 2 (WP2) of the European Social Innovation Campus (ESIC). WP2 supports the Pact for Skills on Proximity and Social Economy by providing a rigorous evidence base for developing a European social innovation curriculum, occupational profiles, and the ESIC Skills Monitor platform. The objective of this report is to make transparent how ESIC generates, validates, and updates knowledge on social innovation competencies, pedagogical approaches, and market needs across Europe.

ESIC addresses a well-documented challenge: social innovators or entrepreneurs operate in complex, multi-stakeholder environments that require not only entrepreneurial and business skills, but also ethical leadership, partnership building, cultural sensitivity, sustainability knowledge, and systemic thinking. At the same time, higher education institutions and vocational providers offer a fragmented and uneven landscape of courses and competence frameworks. WP2 responds to this gap by combining structured academic evidence with large-scale qualitative and quantitative field research across nine European countries.

The methodological design of WP2 follows a mixed-methods, longitudinal and multi-level approach. It integrates three complementary data streams. First, a structured literature review (SLR) provides a validated theoretical foundation. Using Web of Science and a carefully designed search string, WP2 screened more than 450 peer-reviewed publications and analysed a core subset of highly cited and high-impact articles. This SLR identifies key competence domains, existing frameworks, and gaps in social innovation education. In a second phase, this academic mapping is extended using AI-assisted literature discovery to detect overlooked or emerging competence clusters, improving coverage while maintaining academic rigour.



Second, WP2 generates rich primary data through a European qualitative research programme. Between 2024 and 2027, approximately 60 semi-structured interviews, 30 focus groups, and 50 workshops are planned across ten countries and four European regions. Respondents include social innovators, educators, researchers, and policymakers, recruited through ESIC's regional research committees. Interviews are conducted in local languages, transcribed and translated, and then analysed centrally using an inductive and iterative coding approach. This enables WP2 to capture cultural, institutional, and market-specific variations in how social innovation competencies are developed and applied.

Third, WP2 builds a quantitative evidence base through an annual pan-European survey (2024–2027) focused on social innovation skills, labour-market needs, and organisational demand. These data feed directly into the Skills Monitor platform, enabling ESIC to track competence gaps, trends, and regional differences over time.

The first results of the literature review already reveal a coherent competence structure for social innovation, organised around attitudes (e.g. ethical leadership, resilience, inclusiveness), skills (e.g. organisational leadership, communication, innovation management, business and digital skills), and knowledge (e.g. sustainability, strategy, partnership development, and contextual understanding). In parallel, established competence frameworks from sustainability, entrepreneurship, and social innovation literature (e.g. Wiek et al., Lans et al., Ploum et al., Halberstadt et al.) provide validated building blocks for curriculum design and assessment.

Together, this methodological architecture enables ESIC to connect research, education, and labour-market intelligence. The outputs of WP2 feed directly into WP3 (Sectoral Skills Strategy, occupational profiles, and curriculum), WP4 (pilots and training delivery), and WP5 (Skills Monitor



platform and dissemination). By continuously updating its data through literature, interviews, and surveys, ESIC ensures that its skills strategy and digital platform remain evidence-based, responsive to market dynamics, and aligned with European policy priorities for the social economy.



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1. Introduction

1.1 Context

In light of the growing social and environmental issues facing today's society, social innovation seems increasingly important (Millard & Fucci, 2023). However, how can we further develop it? Social innovation refers to the collective efforts and learning processes through which civil society addresses urgent societal needs and fosters significant social change (Edwards-Schachter & Wallace, 2017). Social entrepreneurs are among the most well-known types of social innovators (Avelino et al., 2019). They are celebrated for their innovative approaches and entrepreneurial spirit, which they use to solve complex social issues while maintaining a focus on financial or commercial objectives. Their role as catalysts for change underscores the importance of equipping them with the competencies needed to overcome the challenges of driving social innovation (Eiselein & Dentchev, 2021).

Despite being recognised for their potential to enact meaningful change, social innovators often face substantial hurdles in developing and scaling their businesses and in achieving sustained impact (Seelos & Mair, 2017). One underlying issue is acquiring, nurturing, and refining the skills and knowledge necessary for their ambitious endeavours. The complexity of societal problems, coupled with the dynamic and sometimes paradoxical nature of social innovation, demands a comprehensive skill set in individuals, teams and organisations. However, there is a lack of structured educational pathways and support mechanisms within their supportive ecosystem, and we primarily consider higher education institutions (HEIs) stakeholders.

HEIs are increasingly recognised for fostering social innovation through research, education, and societal missions (Altbach, 2008; Jaeger & Kopper, 2014). There has been a notable expansion of competency



frameworks and courses focused on entrepreneurship and sustainability (Otten et al., 2022), reflecting an increasing institutional commitment to cultivating the next generation of social innovators. However, this proliferation of educational offerings introduces challenges. While the diversity of conceptual and educational frameworks enriches the landscape, it can also complicate it, potentially hindering the effectiveness of support for aspiring social innovators. Additionally, an imbalance in the competencies developed in academic curricula, coupled with a scarcity of coherent course offerings, underscores the need for a more integrated approach to social innovation education (Bogdan, 2016; González-Pérez & Ramírez-Montoya, 2022).

Developing social innovation competencies requires understanding social innovators' needs and selecting pedagogical approaches best suited to their development. It also requires aligning these approaches with both market dynamics and societal demands. Understanding these three aspects would yield a cohesive, comprehensive skills strategy report for social innovation education. This strategy should equip social innovators with a broad range of skills and knowledge, and foster an environment that supports continuous learning and adaptation.

1.2 Purpose of this deliverable

This deliverable (D2.1 – Methodology Definition Report) describes and documents the methodological framework used within Work Package 2 (WP2) of the European Social Innovation Campus (ESIC). WP2 generates the evidence base that supports ESIC's skills strategy, occupational profiles, curriculum design, and Skills Monitor platform.

This report, therefore, explains how ESIC systematically identifies, analyses, and validates social innovation competencies, pedagogical approaches, and market needs across Europe. The report clarifies the research design, data sources, and analytical procedures that ensure ESIC's outputs are



grounded in scientific literature, stakeholder knowledge, and real-world practice. In doing so, D2.1 ensures transparency, quality assurance, and methodological consistency for all subsequent work packages that rely on WP2 results.

1.3 Link to ESIC and Work Package 2

Within the ESIC project, Work Package 2 serves as the methodological and evidence backbone. It integrates academic research and stakeholder insights to identify the knowledge, skills, and capabilities required by social innovators across Europe. The methodologies described in this deliverable generate the empirical foundations for ESIC's core outputs, including educational content and the Skills Monitor. Qualitative and quantitative data collected through interviews, focus groups, workshops, and surveys are analysed using a coherent framework to ensure consistency across countries and stakeholder groups. By doing so, Deliverable D2.1 ensures that ESIC's activities are grounded in a transparent, evidence-based, and continuously evolving methodological approach.



2. Methodology

2.1 Research Strategy

The central research question of the European Social Innovation Campus (ESIC) project is how to develop a social innovation curriculum across nine European countries over the project's four-year lifespan. Table 1 provides an overview of all the different papers and research efforts currently envisioned. Work Package 2 lays a firm foundation for this development by conducting an exhaustive, structured literature review to better which competencies and frameworks have been established (or not) in the relevant literature.

Using a holistic set of search strings across titles, abstracts, and keywords covering social innovation, competencies, and curricula, we search for English-language, peer-reviewed articles in the Web of Science database. Senior researchers, academics, and a panel of social innovation experts discussed this search string in several rounds. We analysed 450 articles and in-depth screened a third of them. The papers selected for in-depth screening were chosen from journals with the highest impact factors, the most publications, and the most highly cited papers. In a second phase, we will extend our SLR approach by using an AI-assisted search to identify overlooked competencies within well-established competency or pedagogical frameworks on social innovation education. Machine learning can automate the learning and screening processes (Zhang et al., 2022) and reduce the time and costs of conducting extensive SLRs while maintaining academic rigour with appropriate oversight (Atkinson, 2023; van Dijk et al., 2023).

Furthermore, WP2 has developed a comprehensive approach to gather a wealth of expertise and insights from various cultures and regions by forming research committees with 15 partners across four European regions. This will benefit various papers and research efforts as we



conduct a longitudinal, qualitative, exploratory study from 2024 to 2027. We aim to understand the implementation process of social innovation education through approximately 60 semi-structured interviews across 10 countries and four European regions, 30 focus group discussions, and 50 workshop sessions. Participants are recruited through various research committees that gather social innovation experts from HEIs, academia, and the government sector. By recruiting a heterogeneous group of respondents from a socio-cultural perspective, we aim to ensure high-quality primary data that covers different perspectives on social innovation. With participants' permission, interviews will be recorded and conducted by partner organisations in their native languages, which will facilitate the interview process. Interviews are conducted in local languages where appropriate. Recordings are transcribed and, where needed, translated to enable consistent cross-country analysis. All data are stored in a central project repository with access restricted to authorised project personnel. The interview protocol will focus on three themes: 'social innovation,' 'curriculum,' and 'competencies. In addition to primary data, we will gather as many secondary data sources as possible to triangulate findings. Through an inductive, iterative process, we will develop the theory. Focus group discussions aim to better various topics, such as "essential competencies," "pedagogical approaches," "development processes and requirements", and "market dynamics."

2.2 Data Sources

The WP2 methodology is based on a combination of secondary and primary data sources. The secondary data consists of a structured literature review (SLR) of peer-reviewed scientific articles retrieved from the Web of Science database. This dataset provides the conceptual and empirical foundation for identifying social innovation competencies, pedagogical approaches, and curriculum models. Primary data is



collected through a longitudinal qualitative research program conducted from 2024 to 2027. This program includes semi-structured interviews, focus group discussions, and workshop sessions, organised across 10 countries and 4 European regions. These data capture the perspectives of experts from higher education institutions, policymakers, social innovation practitioners, and ecosystem stakeholders. Additionally, WP2 integrates secondary data sources, such as policy documents, program descriptions, and curriculum materials, to triangulate findings and contextualise results within national and European education and skills ecosystems.

Primary data collection follows GDPR principles (data minimisation, purpose limitation, and access control). Participants provide informed consent, and analysis and reporting focus on aggregated and anonymised outputs. Further details on data governance for the Skills Monitor are provided in Deliverable D2.3

2.3 Sampling Strategy

Sampling follows a purposive and expert-based approach. Participants are recruited through ESIC research committees, which represent four European regions and fifteen partner organisations. The sampling strategy ensures diversity across geographical, institutional, and sociocultural contexts while maintaining a strong focus on expertise in social innovation. The target sample includes approximately 60 semi-structured interviews, 30 focus group discussions, and 50 workshop sessions throughout the project period. Respondents include social innovation educators, researchers, policymakers, social entrepreneurs, and ecosystem intermediaries. Partner organisations conduct interviews in the respondents' native languages and subsequently translate and centralise them to ensure comparability and analytical consistency.



2.4 Analysis Approach

Data analysis follows an inductive, iterative, and exploratory research design. For the structured literature review, articles are screened, coded, and synthesised to identify recurring competency frameworks, pedagogical models, and conceptual patterns in social innovation education. Qualitative data from interviews, focus groups, and workshops are analysed using thematic analysis. Transcripts are coded to identify key themes related to social innovation, curriculum design, and competence development. Findings from different data sources are triangulated to increase reliability and to ensure that emerging insights are robust across contexts and methods. Combining literature-based synthesis with empirical qualitative analysis enables WP2 to refine and validate the ESIC competence framework, curriculum inputs, and Skills Monitor content continuously throughout the project lifecycle.



3. Preliminary Findings

3.1 Competencies

A review of relevant academic papers yielded comprehensive findings on the essential attitudes, skills, and knowledge of social entrepreneurs as social innovation leaders. The literature discusses how social entrepreneurs can act as effective and ethical leaders while maintaining an entrepreneurial spirit and innovative thinking. Some papers emphasise that social entrepreneurs must be inclusive, able to collaborate with various societal stakeholders, and resilient enough to overcome challenges and navigate the complex maze of social innovation processes. A variety of organisational, communicative, strategic, and innovation management skills are needed in particular contexts, indicating the need for cultural understanding and sensitivity in specific strategic business approaches. Furthermore, we found that expertise in sustainability and partnership development is paramount for social innovation. Figure 1 provides a general overview.

3.2 Frameworks

Across the literature, we identified frameworks that, when considered together, can deepen our understanding and develop the competencies necessary for social innovation education and learning. For example, Wiek et al. (2011) introduce key sustainability competencies and a framework for developing academic programs. This framework emphasises integrating knowledge of sustainability, thinking, and problem-solving skills to prepare students to address complex sustainability challenges effectively. Lans, Blok, and Wesselink (2014) propose an integrated competence framework for sustainable entrepreneurship in higher education. Their work emphasises the importance of an educational approach that combines knowledge of sustainability with entrepreneurial



skills. Finally, Ploum et al. (2018) present a validated competence framework for sustainable entrepreneurship, identifying the specific competencies entrepreneurs need to successfully implement sustainable practices in their ventures.

Halberstadt et al. (2019) advocate a lecturer-oriented service-learning framework that focuses on learning sustainability entrepreneurship through practice. This approach emphasises experiential learning, in which students engage directly with sustainability challenges to enhance their entrepreneurial competencies. Foucrier and Wiek (2019) present a process-oriented framework of competencies for sustainability entrepreneurship.

The framework outlines the competencies entrepreneurs need to develop and manage sustainable ventures, including systemic thinking, ethical reflection, and strategic management. Diepolder, Weitzel, and Huwer (2021) provide a systematic review of competence frameworks for sustainable entrepreneurship. They synthesise existing frameworks to identify core competencies and gaps in the literature. Their goal is to inform future curriculum development.

García-González et al. (2020) discuss social entrepreneurship as a cross-cutting competency and construct and validate an assessment tool in a university context. Their work supports the integration of social entrepreneurship education across disciplines. Sáenz & López (2015) examine social entrepreneurship competencies (COEMS) in university training programs in Ibero-America, emphasising the importance of developing social entrepreneurial competencies in higher education. Sánchez-Hernández and Maldonado-Briegas (2019) examine programs that promote sustainable entrepreneurial culture and social responsibility in a European context. Their research underscores the role of educational programs in fostering a culture of sustainable entrepreneurship and social responsibility among students.



4. Limitations

Although WP2 provides a robust, multi-method evidence base for ESIC, several limitations must be acknowledged. First, the structured literature review is limited by database coverage, language, and publication bias. Although Web of Science offers high-quality peer-reviewed sources, it may underrepresent relevant practice-based knowledge, grey literature, and regionally published work. This limitation is partially addressed in later phases through stakeholder interviews, focus groups, and workshops. Second, the qualitative research relies on purposive expert sampling through the ESIC partner network. While this approach ensures high relevance and contextual depth, it may also introduce selection bias toward well-connected institutions and established social innovation actors. Including multiple countries, regions, and organisational types helps mitigate this risk; However, results should be interpreted as analytically representative rather than statistically generalizable. Third, the longitudinal design means that not all data will be available when early ESIC deliverables are released. Competence frameworks, curriculum insights, and Skills Monitor content will therefore evolve as additional interviews, focus groups, surveys, and pilots are completed. This is an intentional design feature of ESIC, but it implies that early outputs should be understood as provisional and subject to refinement. Finally, AI-assisted literature discovery introduces new methodological opportunities, but it also requires careful human oversight to avoid false positives, misclassification, and overreliance on algorithmic outputs. For this reason, senior researchers with WP2 review and validate all automated outputs.



5. Conclusions

This deliverable establishes the methodological foundation of the European Social Innovation Campus. Through a combination of a structured literature review, longitudinal qualitative research, and emerging digital skills intelligence, WP2 establishes a coherent and evidence-based approach to understanding social innovation competencies, pedagogical needs, and labour-market dynamics across Europe. D2.1 explicitly documents data sources, sampling strategies, and analytical procedures to ensure transparency, scientific rigour, and traceability across ESIC's core outputs. This methodology directly informs the Sectoral Skills Strategy, occupational profiles, curriculum development, validation frameworks, and the Skills Monitor platform. This enables alignment between academic research, stakeholder needs, and policy objectives.

Most importantly, the WP2 methodology is designed as a continuously evolving knowledge system rather than a one-off research exercise. As new data from interviews, focus groups, workshops, surveys, and pilots becomes available, the ESIC competence framework and skills intelligence will be updated and refined. This allows ESIC to respond to emerging trends in social innovation, education, and the European social economy throughout the project lifecycle. Thus, D2.1 provides the methodological foundation that enables ESIC to transition from fragmented insights to a shared, validated, and actionable skills ecosystem for social innovation in Europe. Table 2 provides an overview of how the WP2 methodological components inform the ESIC Skills Strategy, occupational profiles, Skills Monitor, and curriculum development.



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Tables

Title	Methodology	Theoretical approach	Target conference	Expected journal submission
Shaping the future of social innovation education: A Systematic Literature Review of Competence Frameworks	Structured Literature Review	Competence-based Education theory Social Innovation theory	International Association of Business & Society (IABS) - EMES International Research Network (EMES)	2024
Broadening horizons in social innovation education: what machine learning has to reveal		Data-driven decision-making framework	Regional Sciences Dialogues for Peace and Sustainable Development (ERSA)	2025
Current competencies' gap for social innovation across Europe	Qualitative research, semi-structured interviews (+/- 60 interviews; 30 participants in focus group discussions)	Social innovation theory Institutional theory	International Social Innovation Research Conference (ISIRC)	2025
European state of the art of social innovation education		Comparative Education Theory		2025
The pedagogical evolution of social innovation education across Europe		Social Learning theory		2025
The European social innovation	Quantitative research	Institutional theory	Academy of Management	2027



market dynamics	(based on an annual survey conducted between 2024-2027)	Territorial Knowledge Dynamics	(AoM)	
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Table 1. Publication strategy for ESIC research



WP2 Methodology Component	What it produces	Type of evidence generated	Used by WP3 – Skills Strategy	Used for Occupational Profiles	Used for Skills Monitor (D2.3)	Used for Pilots & Curriculum
Structured Literature Review (SLR)	Evidence-based competence frameworks, pedagogical models, and conceptual definitions of social innovation	Peer-reviewed scientific evidence (450+ articles, high-impact journals)	Identifies core and emerging competence domains and validates strategic priorities	Defines baseline competence categories and terminology	Provides reference taxonomy for tagging and structuring skills data	Informs learning objectives and curriculum architecture
AI-assisted literature discovery	Detection of overlooked or emerging competencies and pedagogical trends	Algorithmically supported literature mining with expert validation	Updates and future-proofs the Skills Strategy	Enables dynamic updating of profiles	Supports continuous updating of Skills Monitor taxonomy	Allows curricula to adapt to emerging skill needs

Semi-structured interviews (~60)	Deep insights into real-world skills needs, challenges, and good practices	Expert experiential and contextual evidence	Aligns strategy with practitioner realities	Identifies role-specific skill requirements	Provides qualitative content for skills intelligence	Shapes curriculum content and case-based learning
Focus groups (~30)	Collective validation of key competencies and pedagogical approaches	Multi-stakeholder consensus building	Validates strategic priorities	Confirms competence clusters across countries	Supports cross-country comparability	Co-designs training content
Policy & curriculum document analysis	Mapping of existing national and institutional education systems	Institutional and regulatory evidence	Aligns ESIC strategy with European frameworks	Ensures profiles fit national systems	Enables contextual filtering in the Skills Monitor	Ensures pilot compatibility with local systems
Triangulation across methods	Integrated competence	Cross-validated multi-source evidence	Increases the robustness of the Skills Strategy	Improves the reliability of	Enhances the credibility of Skills Monitor outputs	Ensures pilots are evidence-based

	framework and learning logic			occupational profiles		
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Table 2. Overview of the WP2 Methodological Framework and Its Contribution to ESIC Outputs

Figures

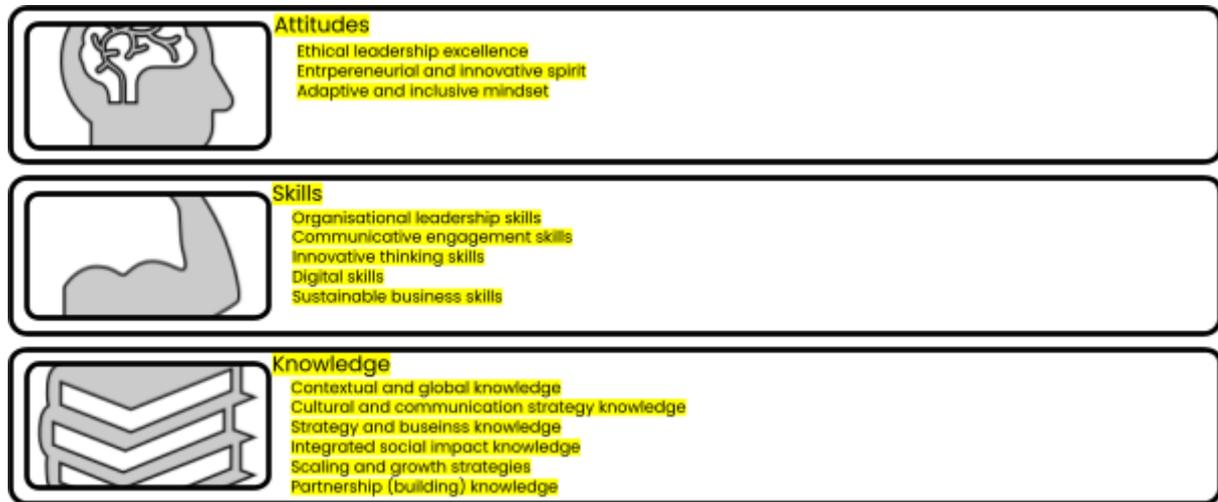
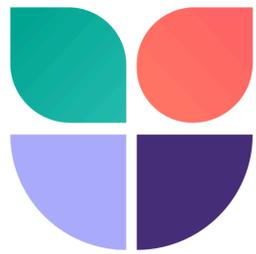


Figure 1. Overview of main categories for social innovation competencies



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