Essentials of University Strategy Development in the Field of Lifelong Learning

Alina Irina POPESCU
Bucharest Academy of Economic Studies, Romania
alina.popescu@rei.ase.ro

Abstract:
The process of strategy development reflects, in any organisation, the clarity of the purpose of the organisation’s mere existence. Although many organisations may decide 'to go with the flow', in the current economic context it is advisable that organisations, including higher education institutions, go through a thorough strategy development process. The lifelong learning approach brings a shift in the paradigm of education, and was considered to be the manner in which individuals get educated in the knowledge-based society. The most active players in the higher education market embraced this approach by developing lifelong learning strategies, either separated or incorporated in the overall university strategy. In this context, the study presents guidelines for the development of strategies in universities, and attempts to investigate to which extent three public universities representative for different regions of Romania have embraced the lifelong learning approach in their university strategies so far. The investigation uses the framework of the principles of university lifelong learning presented in the Universities’ Charter on Lifelong Learning (2008).

Keywords: strategy development, university strategy, lifelong learning, strategic plan
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1. Introduction

The topic of lifelong learning strategy development in universities was researched across several European countries following initiatives formulated at national / regional or EU level. Three major projects in this field were developed at EU level with notable results in terms of guidelines and best practices in lifelong learning strategy development:

1. The project called “Shaping Inclusive and Responsive University Strategies” (SIRUS) over the period 2010-2011, coordinated by a consortium formed by four European level organisations: the European University Association (EUA), the European Continuing Education Network (EUCEN), the European Association of Distance Education Universities (EADTU), and the European Access Network (EAN). The aims of the project are to support universities in developing lifelong learning strategies, to implement the commitments adopted in the European Universities’ Charter on Lifelong Learning, and to disseminate the best practices registered in this field (EUA, Smidt and Sursock, 2011).

2. The project called “University Strategies and Business Models for Lifelong Learning” (USBM) over the period 2008-2010, coordinated by the European Association of Distance Education Universities (EADTU). The project aimed at supporting the development of the lifelong learning strategy by presenting, analysing and sharing institutional strategies and business models for university lifelong learning (EADTU, Ubachs et al, 2011).
3. The project called “The Impact of Lifelong Learning Strategies on Professional Higher Education” (FLLLEX) over the period 2010-2012, initiated and supported by the European Association of Higher Education Institutions (EURASHE), coordinated by KHLeuven – Leuven University College, involves a consortium of 23 partners from 10 European countries. The project aimed at identifying challenges and implications of the incorporation of Lifelong Learning (LLL) into universities’ strategies and at supporting universities in developing an institutional strategy for lifelong learning (EURASHE, Frith et al, 2012).

Other projects add to the list of the initiatives in this field implemented at EU-level, but also at national level. Lindroos and Korkala (2008) researched and documented the lifelong learning strategies of 16 Finnish universities based on the data provided by the universities to the Finnish Ministry of Education in February 2007. Findings reveal different approaches in developing the lifelong learning strategy, although most of the universities preferred to have compiled a separate strategy on lifelong learning in addition to the overall university strategy.

2. Lifelong Learning Strategy Development in Universities

The university lifelong learning strategy is part of the strategic process of universities which may vary from one university to another in terms of organisation, efficiency and success. Nevertheless, several aspects common to all organisations can be identified. Strategy formulation, implementation and control is the aim of strategic management, through which the mission, vision and the strategic objectives of the organisation are established, policies and plans are elaborated and implemented to attain the strategic objectives, and the needed resources are allocated to implement the policies, plans, projects or programs.

Universities can elaborate an overall university strategy that includes lifelong learning involvement as part of the overall strategy, and / or to compile a separate lifelong learning strategy in addition to their overall university strategy. Irrespective of the choice of formulating or not a separate strategy, the lifelong learning strategy has to be correlated with the overall strategy of the university. In this respect, the lifelong learning strategies aim to answer the following questions, according to Lindroos and Korkala (2008, p. 13):

1) How do the lifelong learning strategies connect to the overall strategic processes?
2) What are the universities’ key tasks, aims and plans in promoting lifelong learning?
3) What guiding principles and values do the universities highlight in their strategies?
4) How the provision of continuing education is organised in each university?
5) How do universities take into account lifelong learning in their operations, customer relations, internal cooperation, staff development and management procedures?

Rugman and Collinson (2009) identified six stages of the strategic management process, as presented in Figure 1.
The development of a strategy begins with the strategic planning process. Strategic planning refers to the set up of the mission and / or vision for the university; the analysis of the external and internal environments to identify the opportunities and threats coming from the external environment and the strengths and weaknesses of the organisation; the formulation of several strategic objectives to be achieved, and the formulation of the strategy in order to build upon the strengths and reduce or eliminate the weaknesses. The strategy has to be in accordance with the mission, vision and strategic objectives of the university. Then, the stage of implementation follows, where the chosen strategy is put in practice through programs, projects or action plans. The process of strategy development ends with the stage of assessment and control, where corrective measures are taken if necessary.

The development of a strategy for lifelong learning is a very challenging issue, bringing forward questions like (EADTU, Ubachs, 2011, p.13):

- what target groups to address and how?
- what staff (capacities are) is needed?
- what to offer?
- how to deliver/provide?
- what strategies to use?
- on-campus, off-campus or mixed?
- how to finance lifelong learning activities?

The mission and the vision of the university are formulated considering the position of the university within its regional / national context, and aim to clarify the position of the university in providing lifelong learning. The vision statement indicates where the university expects to be in the future, whereas the mission statement explains why new operations are started and what the university wants to achieve by its operations in general. In addition, in this stage the university’s values, and the ways in which they are implemented in its activities are considered.

The transformation of the university into a lifelong university is envisaged by the following commitments universities may embrace in the overall strategy, according to The European Universities’ Charter on Lifelong Learning (EUA, 2008, pp. 5-7):

1. *Embedding concepts of widening access and lifelong learning in their institutional strategies:* Universities will mention the issue of lifelong learning in their mission and strategy by addressing one or more facets of this complex construct.
2. Providing education and learning to a diversified student population: The concept of lifelong learning for all widens the target market of universities, from students to everybody that wishes to learn. This requires several adaptations universities have to implement to accommodate different categories of learners.

3. Adapting study programmes to ensure that they are designed to widen participation and attract returning adult learners: Adult learners have different needs than students; this is why study programmes will be adapted by creating flexible learning paths.

4. Providing appropriate guidance and counselling services to support learners of all ages and from different social and cultural backgrounds.

5. Recognising prior learning: This commitment of universities is of major importance from the lifelong learning perspective because all forms of learning (formal, non-formal, and informal) are valued in an era where knowledge is acquired in many different forms and places.

6. Embracing lifelong learning in quality culture: The need for a quality culture in universities was triggered by the rapid development of national quality assurance systems, and by several trends that formed the premises of a strong quality culture: increased university accountability to stakeholders, increased university autonomy from governments, the need to find alternative sources of funding, the high expectations of university’s contribution to local, regional and national development, the emergence of the knowledge economy and so on.

7. Strengthening the relationship between research, teaching and innovation in a perspective of lifelong learning.

8. Consolidating reforms to promote a flexible and creative learning environment for all students. The integration of lifelong learning in the strategy of a university requires a strong orientation towards creativity and flexibility in the learning paths.

9. Developing partnerships at local, regional, national and international level to provide attractive and relevant programmes.

10. Acting as role models of lifelong learning institutions.

Environment analysis considers the developments and changes in the external environment, and has the purpose to identify and analyse strengths, weaknesses, opportunities and threats (a SWOT analysis) the university is facing. Also, the analysis of the internal environment of the organisation needs to be conducted to assess the resources at the availability of the university.

EADTU (Bang, 2010, p.22) proposed a framework for reference when conducting a SWOT analysis for strategy development in universities. Firstly, the analysis of a university’s strengths aims to identify whether the university is known for its research in certain areas or for its high-class education, what are the target segments mainly addressed, what is the level at which it operates (local, regional, national or international), what are the preferential agreements concluded with companies. Secondly, the analysis of university’s weaknesses attempts to identify aspects possibly related to student-centred flexible learning, infrastructure, staff’s competences etc. Thirdly, the analysis of opportunities aims to identify profitable market segments and educational needs coming from companies or public bodies. Fourthly, the identification of the threats may consider the competitors with the same competences or those already offering courses in the same
area, the viability of the financing model, the changes in the environment in which the university operates.

This stage sets the basis of the **strategic plan** that usually includes:

- A **statement of strategic objectives** to be reached in the operations/activities – both internally and externally in relation to stakeholders, users/customers and society in general;
- A series of strategic decisions by which the mission and objectives may be achieved;
- A list of general goals to be achieved, usually detailed under the form of specific goals that are quantifiable and time-based. Table 1 presents several goals established by universities from Finland as part of their lifelong learning strategy.

<table>
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<th>Goals</th>
<th>Actions</th>
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| Developing the content of lifelong learning | ▪ Meeting the educational needs using prior knowledge and collaborative networks  
▪ The educational content meeting the current learning needs  
▪ Developing degrees in order to continually match the needs of the working life |
| Developing the viability of lifelong learning services | ▪ Ensure customer orientation  
▪ Developing degree structures which enable the diversification of the study option |
| Developing internationalisation | ▪ Increasing the degree and extension study options in English  
▪ Increasing international innovation and research operations  
▪ Increasing international collaboration between the continuing education organisations |
| Developing the pedagogy and study options suitable for lifelong learners | ▪ Part-time basic education leading to a degree  
▪ Developing open university education  
▪ Developing the modes of teaching and studying |
| Developing the pedagogy and study options suitable for adult learners | ▪ Take the needs of students, who also work, into consideration  
▪ Supporting the development of working communities and learning at work  
▪ Developing Study Counselling |
| Developing the lifelong learning entity | ▪ Developing co-ordination  
▪ Ensuring continuity and quality |
| Strengthening the regional collaboration | ▪ Close co-operation with the other continuing education organisations  
▪ Strengthening partnerships  
▪ Participation in the regional, national and international Development Programmes  
▪ Promoting the co-operation amongst the Universities of Eastern Finland |
| Innovative learning pathways | ▪ The long-term strategic plans of continuing education providers  
▪ Supporting internationalisation  
▪ Strengthening study guidance and counselling  
▪ Strengthening the acknowledgement and recognition of prior learning |

Source: Adapted from Lindroos and Korkala (2008). Selection of goals from different universities.
**Strategy formulation** represents finding the right strategy and business models in order to implement structures and policies to enable the needed organisational change. EUCEN formulates this exercise as “how to move from university lifelong learning to lifelong learning universities?”

Lindroos and Korkala (2008, p. 27) prepared the following summary of lifelong learning strategies employed by the Finnish universities they investigated:

1) **Developing the provision of services**
   - Recognizing and meeting the educational needs of society and the working sector
   - Clarifying the educational service mix, managing customer lifelong learning needs, visibility
   - Developing teaching and conditions for learning and studying, new methods of studying

2) **Collaboration and networking**
   - Strengthening the universities’ internal co-operation
   - Strengthening regional co-operation, collaborating with other educational institutes
   - Utilising the professional networks effectively

3) **Internationalisation**
   - Increasing international operations

4) **Quality**
   - Securing the prerequisites for the implementation of lifelong learning strategies and ensuring quality.
   - Research-based: Science-based teaching

In the formulation of the strategy the university will choose the type(s) of their educational offer by developing programmes and courses that have different objectives and learning outcomes. They might cover all the forms of learning (formal, non-formal and informal) or some of them.

Traditionally, universities offer **formal learning** opportunities under the Bachelor – Master – Doctoral study programs. Nevertheless, formal education should prove meaningful and relevant in its application.

University involvement in **non-formal learning opportunities** began to increase, stimulated by the adoption of a lifelong learning approach. As mentioned earlier, non-formal learning is structured in terms of learning objectives, may end with formative assessment, may include certification, but does not lead to the award of formal academic degrees. Non-formal learning opportunities offered by a university refer to a variety of courses (specialisation courses, teacher training courses, language training courses, professional development, and computer skills courses for senior citizens etc.).

**Informal learning** is the least developed form of learning offered by universities. According to Eurostat (2007): ‘informal learning corresponds to self-learning which is not part of either formal nor non-formal education and training, by using one of the following ways: making use of printed material (e.g. professional books, magazines and the like); computer-based learning / training; online Internet-based web education; making use of educational broadcasting or offline computer-based (audio or videotapes); visiting facilities aimed at transmitting educational content (library, learning centres, etc.).’ They also stated that according to the definition of the European Commission, the intention / aim to learn is the critical point for distinguishing learning activities from non-
learning activities (like cultural activities, sports activities etc) especially when discussing about informal learning. In this category of learning opportunities we include open educational resources developed and made available online by universities to anyone who wishes to study them.

In addition to the type(s) of learning selected, the university will decide upon the delivery style of the different courses and programmes. The delivery style varies from wholly face-to-face (on campus) teaching to wholly online teaching, with many forms of blended learning in between.

3. Case studies. Lifelong Learning Practices of Selected Romanian Universities

Methodology: The present research investigates the extent to which selected public universities from Romania embraced the lifelong learning approach. Three universities were selected for a qualitative investigation of the case-study type. The universities were selected to be representative for different historical regions of Romania, based on data availability on their institutional website. The analysis of university strategy documents was conducted based on the framework of the university lifelong learning principles universities commit to according to the European Universities’ Charter on Lifelong Learning (EUA, 2008):

1. Embedding concepts of widening access and lifelong learning in their institutional strategies.
2. Providing education and learning to a diversified student population.
3. Adapting study programmes to ensure that they are designed to widen participation and attract returning adult learners.
4. Providing appropriate guidance and counselling services.
5. Recognising prior learning.
7. Strengthening the relationship between research, teaching and innovation in a perspective of lifelong learning.
8. Consolidating reforms to promote a flexible and creative learning environment for all students.
9. Developing partnerships at local, regional, national and international level to provide attractive and relevant programmes.
10. Acting as role models of lifelong learning institutions.

In addition to this framework, the participation of the university in the European Union’s Lifelong Learning Programme (LLP 2007-2013) and the provision of education in different learning contexts (formal, non-formal and informal) were investigated.
3.1. The University “Constantin Brâncuşi” of Târgu Jiu (“UTGJIU”)

The following public documents were identified on the website of The University "Constantin Brâncuşi" of Târgu Jiu at the date of this research was conducted:

- The Charter, amended in 2012;
- Regulation regarding University’s responsibilities in the field of Lifelong Learning, dated September 28th, 2011;
- Other procedures and regulations: Regulation regarding the statute of Free Mover Students, Procedure for the recognition of ERASMUS study visits, Regulation regarding the use of the credit transfer system, Procedure for the tracking of graduates’ professional insertion, Regulation regarding the organisation and functioning of the Department for Distance Learning and Continuing Training.

The University “Constantin Brâncuşi” of Târgu Jiu (from now on referred to as „UTGJIU” or “the university”) amended in 2012 the university charter according to the provisions regarding the lifelong learning of the Law of Education no. 1/2011. More so, the university elaborated a separate regulation regarding the lifelong learning activities to be involved in, and aims at developing a separate strategy for lifelong learning according to the provisions of the regulation. The development of continuing education strategies is considered to be a priority of the university given the following motives: the emergence of the knowledge-based society, the need to access state of the art knowledge and information, the need to effectively use the available resources.

The university understands the needs of every individual to learn throughout lifetime in order to gain knowledge, skills and competences valuable from personal, social, civic and / or professional viewpoints. The strategy plan aims to ensure:

- The access to a learning based on the needs of education and training;
- The adaptation of university’s offer to accommodate the learning needs of different categories of learners so as they are able to combine learning with the family life and/ or working life;
- The achievement of high educational standards and high quality training so as the knowledge and competences provided meet the requirements of the labour market;
- The stimulation of learners’ active participation to the community life.

The Plan of Actions regarding the implementation of the lifelong learning approach includes:

- Conducting studies and analyses regarding the needs for education and professional training at regional level;
- The elaboration of local plans of intervention in the field of continuing education;
- The provision of continuing training courses certified by the National Authority for Qualifications for: qualification, requalification, professional reconversion, initiation, specialisation, and improvement;
- The provision of information, guiding and counselling services on the courses and programs for continuing education and training.

Lifelong learning activities at UTGJIU are coordinated by the Department for Distance Learning and Continuing Training. The university provides identification, assessment and recognition of lifelong learning results. Due to their certification, UTGJIU is able to
recognize prior learning done in different learning contexts, including the non-formal and informal contexts, based on the Methodology for the recognition of the results of learning in non-formal and informal contexts elaborated by the Ministry of Education.

Career guiding and counselling services are provided by a dedicated department that aims to assist individuals of any age to make educational and professional choices to develop their career. The following activities are provided by UTGJIU in this field:

- Provision of information on career planning and developing;
- Provision of information on the labour market requirements, the needed competences and skills, and community life opportunities;
- Career counselling so as to help individuals clarify their aspirations and purposes in life, to understand their own educational profile, to make informal decisions, to administer their career and transition periods at different moments in life;
- Employment counselling so as to help individuals to clarify their immediate goals regarding the employment, to learn the required skills to seek and obtain a job;
- Work placement so as to help individuals to obtain a job.

The financing of lifelong learning activities can be ensured from public and private funds based on public-private partnerships, from employers’ partial or entire contribution, from non-governmental organisations, from European programmes, own contribution or accounts for continuing education. Here it is worthy to be added that the “accounts for continuing education” were introduced by the Law of Education no. 1/2011 to stimulate lifelong learning. According to the law, each child is entitled at birth to receive from the state an aid in amount of 500 EUR for educational purposes; in addition, parents can redirect 2 percent of their income tax to this account on a yearly basis. This measure is said to be applicable for children born starting with 2013.

3.2. The Bucharest University of Economics (“ASE Bucureşti”)

The following public documents were identified on the website of The Bucharest University of Economics at the date this research was conducted:

- The Charter dated September 2011

The Bucharest University of Economics (from now on referred to as “ASE” or “the university”) doesn’t have compiled a separate lifelong learning strategy in addition to the overall university strategy. In what follows, elements related to lifelong learning are identified in the public documents presented earlier. Because these documents often present different approaches from one another, individual references are going to be used when presenting the findings.

The university acknowledges the central role of higher education institutions, their social responsibility and their role in the sustainable development of the society. Consequently, ASE aims to transform itself into an entrepreneurial university, actively involved and integrated into the European area of higher education. The orientation toward the
customer leads the university to understand and analyse the needs of their customers in order to meet them. Offering study programmes centred on students is one of the objectives of the university, without clearly specifying the actions taken to actually meet this objective.

The mission of the university was conceived and implemented so as to address the societal needs through the study programmes offered. This means that the university understands their role in the development of society through education. This “duty” of the university is extended beyond the initial education, to continuing education. The aims of the university are to provide: logistic and professional support for continuing education, an adequate climate for the personal development of the university community members, support for the promotion of partnerships at national and international level, and a high quality of the educational process.

As regards the learning contexts, ASE provides mainly formal learning activities that cover both initial and continuing education: university education (bachelor, master, and doctoral degrees), and post-university education (postdoctoral and continuing education and training courses). The study programmes are organised either on-campus with normal frequency (bachelor, master and doctorate), on-campus with low frequency (bachelor and master), or in a mixed mode (on-campus and on-line) for bachelor distance learning only, according to the provisions of the Law of Education no. 1/2011. No particular adaptation of the study programmes to widen the participation of learners was identified. The recognition of prior formal learning is done through the use of the ECTS. This is assessed to be a minimum effort from the lifelong learning perspective, since according to this view the recognition of all forms of learning is to be provided to learners.

ASE participates in EU Lifelong Learning Programme 2007-2013, holding a valid Erasmus University Charter. For the academic year 2012-2013, the university concluded agreements with 98 partner universities from 20 European countries (ASE, 2012).

3.3. The “Babeş-Bolyai” University of Cluj-Napoca

The following public documents were identified on the website of The “Babeş-Bolyai” University of Cluj-Napoca at the date this research was conducted:

- The Charter dated February 2012;
- The Strategic Plan for 2012-2015;
- The Regulation regarding the activity of the Centre for Continuing Training and Distance Learning – low frequency.

The “Babeş-Bolyai” University (from now on referred to as “UBB” or “the university”) considered the main trends registered at international level in the field of higher education when it elaborated the strategic plan of the university: the increase in the number of non-traditional students, the increased importance of technology in the educational process, the increased importance ascribed to transversal competences, the increased importance attributed to the monitoring of students’ professional path, the increased social importance of higher education etc.

University’s mission considers the role of continuing education in the development of society. UBB aims to ensure the training of students and researchers as active and responsible citizens, by promoting education and research in accordance to the requirements of the knowledge-based society through initial and continuing education. In
addition, UBB aims to contribute to the local, regional and national development from social, economic, cultural and political perspectives, through an involvement correlated to community needs.

Although a separate strategy on lifelong learning was not identified, the university places a lot of emphasis on the importance of continuing education and training. Also, distance learning programmes are available to adults seeking initial or continuing education in a flexible manner, without having to interrupt their current professional activity.

The main strategic goal of UBB is the provision of education adapted to the knowledge economy. Among the objectives formulated to support this strategic goal we find several objectives related directly to the lifelong learning approach, such as:

- The harmonization of the curricula with the requirements of the labour market;
- The increased importance of the internships provided to students through partnerships with the business environment;
- The support of national and international student mobility;
- The improvement of the internationalisation degree of learners, researchers and faculty, and by providing “joint degrees”;
- The development of continuing education and training programmes;
- The development of tools for monitoring graduates’ insertion in the labour market and their career path.

The second strategic goal of UBB is the development into a regional and national pole for adult continuing education and training. The objectives set to achieve this goal are:

- The support and development of continuing professional education and training;
- The development of e-learning facilities and distance learning / low frequency programmes;
- The harmonization of the professional education and training programmes with the current requirements and forecasted needs of the labour market.

Several indicators are used to monitor the university’s performance in achieving this strategic goal: the number of continuing education and training programmes developed / initiated/ continued; the number of learners; the number of individuals that used university’s learning facilities; the number of networking, promotional and /or dissemination activities conducted to communicate the continuing education and training offer; the number of beneficiaries of the networking, promotional and /or dissemination activities conducted to communicate the continuing education and training offer; the number of distance learning / low frequency programmes and the number of students of this type of programmes; the opinions of the graduates and employers regarding the study programmes offered by UBB.

Community involvement represents another strategic development direction of UBB. The university formulated three strategic goals in this respect:

- Turning into advantage the highly specialised expertise and competency by providing services to the business environment, civil society and public administration, by initiating and developing fundraising campaigns, providing consulting services, increasing the dissemination of research results;
- The emphasis on the university’s role as a major education and culture provider, by concluding partnerships with cultural institutions, organising cultural events, and promoting the city to qualify for the title of European cultural capital;
The increase of university’s involvement into community, by engaging in public debate, initiating a CSR programme, and networking with existing economic, civil, and public administration partners.

4. Conclusions

Universities’ involvement in different lifelong learning activities presented in this study was assessed based on the provisions of university documents on strategy and from other public internal documents, as mentioned at the beginning of each case study. This is why the research findings have a declarative nature, meaning they represent what universities declared in public documents to aim in relation to lifelong learning implementation at institutional level, not what they have actually done in this respect.

The lifelong learning approach is widely supported at international level, and it begins to gain importance at national level too. Although the national strategy for lifelong learning is currently under development, several provisions on lifelong learning were formulated in the Law of Education no. 1/2011. At university level, the actual shift towards the lifelong learning approach is in progress. Findings show that the degree to which the investigated universities embraced the lifelong learning orientation in their strategy varies largely. As regards the actual implementation and organisation of the lifelong learning activities huge differences were noted as well. Among the obstacles universities face when organising lifelong learning activities the following are to be mentioned. First, the lack of understanding of the construct of lifelong learning at the level of top management and how this can actually help universities in maintaining / gaining competitive advantages over competitors. Secondly, the lack of interest to move from traditional higher education to a student-centred education, where educational programmes are designed starting from the needs of learners. Although some concepts related to lifelong learning were adopted and some disparate measures were implemented – like distance education, e-learning, continuing training, career counselling – one cannot conclude that the universities in Romania transformed or are in the process of transforming themselves in lifelong learning universities. But the good news is that the process was initiated. Other obstacles refer to the lack of proper infrastructure, learners’ and employers’ preference for private training companies, rigidity in adapting the study programmes or organising new study programmes according to the needs of the learners, lack of studies to show the future needs of the labour market. The fact that universities are still in the incipient stage of the process of transformation into a lifelong learning university can be justified by the lack of coherent legislation in the field of lifelong learning. Nevertheless, the most active universities have taken measures in this respect.

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