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International transfer of vocational education and training: a literature review

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ABSTRACT

The transferability of vocational education and training (VET) systems is a central issue within international comparative VET research. However, scholars working in related disciplines also focus on the international cooperation associated with VET. This literature review presents relevant findings from the field of VET research, but also from the fields of comparative political economy, comparative educational research, and international human resource management. It explores differences and parallels in research about policy transfer between these fields. For example, scholars working in the comparative political economy and educational sciences tend to focus on transfer activities at the systemic level, while those working in international human resource management tend to focus on regional management strategies, and scholars working in VET research focuses on successes and obstacles associated with cooperation. All of these features are interconnected, providing important insights into the transferability of VET systems. The following discussion begins by exploring the rationales underpinning different disciplinary perspectives on policy transfer in VET. Next, it reviews empirical research on the transfer of VET policies from different disciplinary perspectives. It concludes with a critical reflection on the transfer potential – and ho w scholars in all relevant disciplines stress the need for cultural sensitivity, adaption, and long-term planning when transferring policy from one country to another.

KEYWORDS

International cooperation; literature review; policy borrowing; policy learning; training; transfer; vocational education

1. Introduction

The transfer of vocational education and training (VET) systems is currently an important topic in international debates (Davoine and Deitmer 2020; Maurer and Gonon 2014a; Valiente and Scandurra 2017; Allais 2010; King 2014; McGrath 2002). The reasons given for policy transfer in the VET sector are complex and include aspects like (youth) unemployment reduction, poverty reduction, equipping skilled workers and increasing economic growth (Wiriadidjaja, Andriasanti, and Jane 2019; Stockmann 2019; France Diplomacy 2019; Bank et al. 2015). However, surprisingly little recent research has explored issues such as

practicability, successes achieved, problems encountered, and long-term effects. Scholars are more likely to focus on the theoretical basis for training transfer (Dolowitz and Marsh 2000), or on options for transfer at a more intermediate level of abstraction (Gonon 2014).

'Policy transfer' can be defined in various ways, and this can be confusing partly due to the nuances involved of policy transfer, and partly due to the fact that different definitions have emerged within different academic disciplines. For example, the terms 'policy learning' and 'policy transfer' are used in political science, while 'policy diffusion' and 'policy reception' are used in sociology, social anthropology, and historical studies. The terms 'policy borrowing' and 'policy lending' originated in the comparative educational sciences (Finegold et al. 1993; Steiner-Khamsi 2012). Terms such as transfer, export, and policy borrowing or learning are also imprecisely defined or controversial, partly because different disciplines use different metaphors for the policy transfer process. Policy transfer is commonly used in the international and interdisciplinary context: this term covers the transfer of education, but it also implies the transfer of procedures, measures, strategies, and concepts in the broadest sense (Rose 1991).

The following discussion is not limited to a narrow conceptualisation of policy at the systemic level; it also focuses on micro-political transfer activities that are highly relevant to VET. It will build on Hulme's (2005) ideas about the 'movement of ideas and practices' and apply the term 'policy' in its broadest sense.¹ It will demonstrate that policy transfer as it relates to VET² is not the exclusive domain of scholars working in international comparative VET research; it is related to work being conducted in various disciplines and from different perspectives. However, scholars working in all disciplines are guided by the same basic questions related to the dimensions of the motives of the transfer, the actors involved, the transfer process, the object of the transfer and the degree of success of the transfer (e.g. Rahimi and Smith 2017). In other words, what is transferred, how, and with what results, and which factors are decisive? This literature review synthesises the findings from different disciplines, exploring differences and similarities; the results provide important lessons for scholars working in comparative vocational training research.

We have selected a narrative approach to investigate this complex topic (Ferrari 2015). This technique is particularly useful in this context because it can incorporate literature from different countries and different languages in appropriate and meaningful ways, despite the different terminology used (Hammersley 2006). This extensive literature review includes contributions from scientific journals, anthologies, and monographs from recognised institutions. It does not include project reports or other reports on single implementation at the microlevel, because they have little value in terms of scientific generalisation. We searched electronic databases, and also conducted research in libraries and by applying a snowballing strategy, to find research published in English and also

German, due to the special importance of the topic in German-speaking countries (e.g. iMove 2020). We have included theoretical and conceptual contributions, as well as empirical studies on policy transfer. All publications were assessed for quality, including the standards of scientific work, such as the review process, quality of citation, etc. Relevant themes were identified using inductive category formation. The next sections introduce policy transfer research from various disciplines. Each discipline is discussed separately – first by outlining the specific focus of each discipline, followed by an exploration of the relevant theoretical, conceptual and empirical results. Finally, we synthesise the results from all disciplines to derive conclusions and possible directions for future research.

2. Policy transfer research in different disciplines

The academic disciplines of comparative political science, comparative education science, and comparative VET research all have a long history of policy transfer research, so they are the main focus of this literature review. We have also chosen to include some findings from the disciplines of human resource management and economic geography, because these fields overlap to a large extent with VET research topics such as skilled worker qualification.

Scholars working in comparative political science explore patterns of VET in different state regulations, for example transfer activities and associated convergences or divergences (Busemeyer and Trampusch 2012). Those working in comparative educational science focus specifically on the international transfer of education and its possible forms (Noah and Eckstein 1969), including the transfer of external educational ideas, strategies, measures, or concepts. Those working in comparative VET research focus specifically on policy transfer in the VET field at the systemic, institutional, and training level (Pilz 2016a). Scholars working in international human resource management are most interested in the operational transfer strategies of multinational companies (e.g. Edwards, Colling, and Ferner 2007), and those working in economic geography stress the importance of locations as well as the internationalisation of knowledge (Fuchs, Schamp, and Wiemann 2016).

All of this work is interrelated, and it is not always possible to delimit the results. For example, it is difficult to separate general education and VET: the two merge seamlessly in some areas of policy transfer research, e.g. poverty reduction (Maurer 2014). Therefore, some of the findings relating to general education are highly relevant here, as are some of the findings from development cooperation, which is currently an important topic in the fields of comparative political science, educational science, and VET research.

2.1. Transfer in Comparative Political Science

Within the field of comparative political science, policy transfer research is based on the idea that the market economy is organised by different institutional regulation patterns (varieties of capitalism), which are associated with different VET systems (skill formation systems). With regard to transfer activities, the focus is particularly on cooperation between governments of two countries: transfer processes from one country to another (one-to-one) as well as global patterns. The transfer of complex systems or single system components from one country to another is related to development cooperation and political cooperation, while global patterns are closely linked to globalisation and the resulting convergent lines of development (Dolowitz and Marsh 2000). The trend towards globalisation is accompanied by international standardisation processes that are also becoming similar worldwide or regionally (Kerr 1983). One example is the merging of political and economic spaces to form country-level communities, such as the European Union (EU) or the World Trade Organisation (WTO), in which members are required to implement certain regulations and standards within their own political and economic systems (Dolowitz and Marsh 2000; Maurer and Gonon 2014b).

When investigating transfer activities, scholars working in comparative political science often focus on the relationship between the actors involved and the impulses that result from this relationship. The direct and indirect phenomena of lesson-drawing and policy diffusion are two examples; these terms have slightly different meanings, but they both refer to transfer processes from one political system to another (Dolowitz and Marsh 2000). However, there is one important inherent difference: lesson-drawing refers to a voluntary and conscious process of transfer, while the term policy diffusion also includes unconscious or imposed activities (Evans and Davies 1999).

Evans (2009) identified three forms of policy transfer: voluntary transfer (i.e. lesson-drawing), negotiated transfer, and direct involuntary transfer. Voluntary transfer describes a well-thought-out rational transfer of policies from a foreign political system in order to counteract problems in one's own system; possible approaches are assessed in terms of their likelihood of success and feasibility (Rose 2005; Dolowitz and Marsh 2000). A negotiated transfer refers to a transfer process in which the adoption of a certain policy is a condition to be fulfilled in order to receive specific services from another government; for example, possible accession in the EU is linked to the adoption of certain policies and compliance with specific standards (Shapiro 1992). A direct involuntary transfer refers to a transfer that takes place against the will of the receiving country; these activities were particularly widespread during the era of imperialism, when colonial powers imposed certain policies on their colonies (Evans 2009; Singh 2001; Dolowitz and Marsh 2000; Arnove 1980). Dolowitz and Marsh (2000) identified numerous other variations with combinations of the characteristics of

voluntary transfer, negotiated transfer, and direct involuntary transfer, and described them as a policy-transfer continuum.

The transfer process itself is also a focus of attention within comparative political science (Schrank 2020). Hulme (2006) noted that it is problematic to frame the transfer process rigidly. In his study on transfer activities in the education sector between the USA and Great Britain, he referred to Ball (1990, 1998) and stated that policy-making in education 'is evolutionary and fluid rather than rational-technocratic and linear with orderly stages and decision points' (Hulme 2006, 177). This may result in deviations between the implementation originally planned at the systemic level and the actual implementation (Zhang and Marsh 2016).

Not all transfer activities are, however, successful, Dolowitz and Marsh (2000) identified three main reasons for a failed transfer: first, a transfer can fail if the receiving country has not sufficiently addressed the functioning and general conditions of the transfer object, or has been provided with too little information on it (uninformed transfer). Second, a transfer can fail if components essential for the functioning of the object were not transferred (incomplete transfer). Third, a transfer may fail if differences in the economic, social, political, and ideological framework conditions between the actors involved are too great (inappropriate transfer) (also see Hulme 2005). Busemeyer and Vossiek (2016) explored the relevance of social partnership traditions for the development of dual training structures and concluded that although these contextual conditions exert considerable influence, they are by no means unchangeable. Gessler (2020) also addresses the stakeholder here and mentions the important factor of stakeholder management. Despite large contextual differences, Hulme (2006) concluded that low-threshold bottom-up approaches are more likely to be successful, e.g. when organisations exchange best-practice approaches.

In summary, it is clear that the discourses within comparative political science focus primarily on the systemic level. This approach allows critical examination of the transferability of policies, and can reveal dilution effects between planned implementation and actual implementation. In particular, the context itself is identified as a possible obstacle. These findings provide important insights into the dynamics and limitations of policy transfer, which can be applied to inform the design of promising transfer efforts.

2.2. Transfer in comparative educational sciences

As in comparative political science, transfer research is also an important topic within comparative education science - in particular international educational transfer and its possible forms (Noah and Eckstein 1969), with a main focus on ways to solve problems through the transfer of external educational ideas, strategies, measures, or concepts from one country to another. Scholars working in this field have explored the possibilities of education export and global adjustment mechanisms. Steiner-Khamsi (2012) identified three generations of transfer research: the first generation developed basic theoretical concepts on different aspects of educational transfer, including selective educational transfer (Holmes 1965), externalisation theory (Zymek 1975; Schriewer 1988), and the transnational attraction of policies (Phillips 2006). This work is primarily concerned with the study of voluntary policy transfer movements between industrialised countries. The second generation extended the geographical radius of the study to include not only industrialised countries but also emerging and developing countries. Much of this work focuses on forms of forced transfer through colonial rule (e.g. Carnoy 1974) and negotiated transfer between developing countries and transnational organisations (World Bank 1996). The third generation shifted the focus of research from bilateral policy transfer to the internationalisation of national educational processes, e.g. through the implementation of international standards (Waldow 2012). In this way, comparative education science clearly parallels comparative political science: both disciplines distinguish between conscious or unconscious and voluntary or involuntary transfer activities (Perry and Tor 2008).

These parallels are also evident in the continuum model of educational transfer developed by Ochs and Phillips (2004), who built directly on the findings of Dolowitz and Marsh (2000) from comparative political science and applied them to the educational science context. Their model positions imposed involuntary educational transfer at one end of the continuum, politically negotiated educational transfer in the middle, and voluntarily introduced educational transfer at the other end of the spectrum. Phillips and Ochs (2003, 451–457) used the term 'policy borrowing' to refer to a transfer that is completely voluntary, and developed a detailed and oft-cited process model of policy borrowing. The model involves a four-step cycle: the first stage involves transnational attraction of certain policies as a trigger. These could be domestic issues such as systemic instability, politically motivated efforts to push through reform, or negative external evaluations of the national situation (Phillips and Ochs 2004). For example, Waldow (2016) investigated the stereotyping of educational systems against the background of the attractiveness of a policy that precedes a transfer, and identified both positive and negative or 'deterrent' reference societies. The second stage of Phillips and Ochs' process model involves the possible form of the transfer – which, in addition to the actual implementation, can also include theoretical and scientific examination of certain system elements. The policy is then introduced into the transfer country, and modelled according to the specific contextual features. If the actors involved agree to the transfer, the system component is embedded and integrated into the existing structures of the host (receiving) country (Phillips and Ochs 2003; Ochs 2006). For example, Schweisfurth (2006) investigated global and cross-national influences on education in post-genocide Rwanda, with a specific focus on the global and bilateral influences of development cooperation, as well as the influence of returning diaspora on Rwanda's education system. Schweisfurth concluded that political change and systemic breakdown lead to cross-national attraction, and that the motivation behind policy borrowing is to learn from past mistakes. This leads to the externalisation of potential, and in this context education was seen as a way to secure peace and fight poverty. The decision-making process was influenced by various factors including negotiations between donor and recipient of development cooperation and the personal experiences of the diaspora. The third step of implementation in Phillips and Ochs' process model is determined by the resources and willingness to cooperate on the ground. In the final step, the new policy is internalised into the education system of the policy recipient country.

Cowen (2006) also investigated the transformation process and divided it into three main phases: transfer, translation, and transformation. He defined transfer as the moment in which a specific subject comes up for transfer; translation refers to the interpretation or modelling of the policy by the transfer process, and transformation of the policy is triggered by the new social and economic context. This parallels the forms of transmission discussed in comparative political science.

In addition to focusing on the perspective of the host country (receiving country), scholars working in the field of comparative education explicitly refer to the export character of education transfer, and refer to this as policy lending (Steiner-Khamsi 2002; Tanaka 2005). Robertson, Bonal, and Dale (2002) explored economic motives for a transferring country (also Ochs and Phillips 2004). They found that knowledge nations in particular, whose economic activities consist largely of services, are very interested in exporting their knowledge resources. In this context, consulting firms, private educational institutions, and the textbook industry are the main beneficiaries. In this way, it is clear that the policy lending approach is not a simple change in perspective from the receiving country to the transferring country. Instead, a distinction must also be made here between the motives for the transfer and the degree of voluntariness.

As in comparative political science, the perspective of comparative education is not exclusively directed towards a one-to-one transfer. For example, Dale (1999) drew attention to the differences between traditional transfer approaches, such as policy borrowing and lending, and the mechanisms of globalisation. Against this background of globalisation, scholars working in the field of comparative educational sciences must grapple with the possible mechanisms of adjustment and transfer (Dale 2000a). One example is the Millennium Development Goal of the United Nations, which sets 'Education for All' as the goal of development cooperation in the field of education (UN Millennium Project 2005). Traditionally, upbringing and education have been regarded as 'nationally organised realms of reality' (Adick 2005, 244), but a global perspective is becoming more important.

Early work in this field suggested divergent developments in individual education systems. However, in more recent work scholars have been investigating signs of convergence emerging between countries. Examples include one research group of Meyer, Boli and Ramirez (e.g. Meyer and Ramirez 2000; Boli, Ramirez, and Meyer 1985), who were inspired by neo-institutionalist approaches. Others have investigated schools as they relate to a globally dominant world model, following a world system approach (e.g. Wallerstein 1984). Anderson-Levitt (2003) built on this work to explore the increasing convergence of school systems worldwide.

Cross-national harmonisation phenomena include, for example, the introduction of compulsory education to codify curricula and school qualifications, the establishment of state education authorities, and the professionalisation of the teaching profession. Many scholars have focused on the privatisation and expansion of higher education (e.g. Mok 2000), competence-based approaches, the recognition of informally and non-formally acquired competences as well as national and international qualification frameworks (e.g. Kopecky 2014), or the Bologna Process (e.g. Voegtle, Knill, and Dobbins 2011; Toots and Kalev 2016) as transnational and possibly approximating mechanisms, and the hybridisation of the lifelong learning regimes with the national VET systems (e.g. Verdier 2013). Burde (2004) concluded that such export movements can originate from single countries or international organisations, but are also shaped by funding agencies such as the World Bank (for a critical perspective Kopecky 2014). These organisations determine certain development trends through calls for tenders for funding and the associated conditions (Jones 2004).

Contextual factors are important elements in both one-to-one transfer and global alignment processes (Ball 2008, 30). Here, this is less an issue of transfer-impeding influences, but rather local adjustments as the consequence of a transfer (Ozga and Jones 2006). For example, Kim (2017) investigated how cultural and historical conditions influenced the transfer of education, specifically during curriculum reforms following the occupation of North and South Korea by the Soviet Union and the USA after the Second World War. Kim concluded that the framework conditions have a major influence, which leads to corresponding adjustments – usually lasting years or decades – involving local actors who are familiar with implementation and are vital components of the adaptation process. In this context, many scholars have applied international cooperation theory to analyse vocational training cooperation (Wiriadidjaja, Andriasanti, and Jane 2019).

In summary, many of the ideas discussed above have parallels with their counterparts in comparative political science. The focus is often on making transfer processes analysable and understandable (Steiner-Khamsi 2002). Common views and objectives of the transfer partners involved, as well as favourable contextual conditions, are relevant in both borrowing and lending. Possible international alignment mechanisms are often viewed rather critically

in comparative education sciences, against the background of the associated exploitation aspects of education and the orientation towards the needs of the labour market (the 'economisation' of education, e.g. Dale 2000a, 2000b; Lingard 2010; Takayama 2013; Kopecky 2014). These international alignment mechanisms result from a global spread of best-practice approaches, which are understood less as targeted transfer activities, but rather as a kind of diffusion with its own dynamics.

2.3. Transfer in comparative VET research

In comparative VET research, transfer activities are usually discussed from the perspective of a donor country to a recipient country that is in need of development or reform in the field of vocational training. For example, Germany's dual training system is being discussed in the context of the Europeanisation of the VET system (e.g. Maurer and Gonon 2014b; Bohlinger and Fischer 2015); the introduction of modular structures modelled on the UK is also being considered theoretically for Germany (Li and Pilz 2017; Pilz 2002).

Most research in this field focuses on development cooperation activities (e.g. Langthaler 2015; Stockmann 2014; Heitmann 2019). In the 1960s the term 'technical vocational education and training' was used, but most development cooperation scholars now prefer the broader term of 'vocational skills development'. This trend reflects the shift in focus from exclusively formal VET to a range of vocational training activities in formal, non-formal, and informal settings (King and Palmer 2007). This development can be interpreted as reflecting lessons learned, because in the past the informal sector of the economy which accounts for a substantial share of many developing countries - has been given little consideration in development cooperation efforts.

Research on development cooperation has demonstrated the importance of considering the donor's perspective. Above all, global actors such as the World Bank, International Labour Organisation (ILO), and Asian Development Bank have a major influence on setting the agenda for VET activities on the ground. For example, McGrath (2002) and also Maurer (2014) reported that in the 1980s the World Bank and other global donors phased out their financial support for VET, and instead strongly supported the development of basic education – but since 2000, VET activities have been put back on the agenda of global actors (Asian Development Bank 2004; World Bank 2010). The influence of global actors is not limited to agenda-setting and related funding; it also influences which concepts are implemented in recipient countries. For example, King (2014) demonstrated how the ILO promoted so-called national industrial training centres in India, Ghana and Tanzania, illustrating the global influence of policy learning. McGrath (2002, 2012) has argued that the global influence on vocational skills development is increasing and leading to convergence in policy transfer, and referred to global concepts that are being transferred worldwide.

Bilateral development cooperation involving VET has occurred between former colonial parties, and this has been critically discussed in the literature. For example, countries in the former French West Africa adopted VET concepts from France, including curricula and certificates (Maurer and Gonon 2014b). The introduction of a dual training system based on German, Austrian, or Swiss models is seen as another bilateral development cooperation project (Maurer and Gonon 2014b). However, dual training systems have been criticised for being difficult to understand and accept culturally in recipient countries (King 2014). Gonon (2014) argued that success in implementing a dual system should only be of secondary importance – that it should merely be a means of starting a dialogue with local actors and initiating processes (see also Wieland 2015).

Recent developments have revealed that former developing countries, once acting as policy takers, also act as policy donors to developing countries, due to their economic rise and associated political power. For example, Barabasch, Petrick, and Park (2017), noted that South Korea has gone from being a recipient country for aid programmes to a donor country. Another example is China, which has been supporting Ethiopia in the development of curricula for vocational training since 2001; from 2001–2012, China sent more than 400 teachers to Ethiopia to train local teachers involved in agricultural vocational training (Niu and Liu 2016).

McGrath (2002) argued that since the beginning of the 1990s, development cooperation has emphasised the donor too strongly by stressing enterprise-based training over school-based training. He noted that the logic of employment models used in the Western world are often taken as a starting point, without taking into account local labour markets. He also criticised the phenomenon of multi-donors, noting that a recipient country may have different donors working in parallel but independently of each other, under the jurisdiction of different ministries. Wallenborn (2010) took a stronger stance on enterprise-based training, arguing that VET should contribute more to human capital development than to the education system, and should thus adapt to the recipient country's work culture and technical requirements.

National qualifications frameworks (NQF) (Allais 2014; King 2014; Maurer 2014; Maurer and Gonon 2014b) and the transferability of dual vocational training systems (Schmidt and Benner 1989; Lauterbach 2003; Mayer 2001; Geiben 2017 offers a detailed overview of transfer models) are topics of much debate within the field of development cooperation and beyond. The following discussion explores the literature on these two policies.

NQFs were strongly promoted in the context of development cooperation, particularly between 2000 and 2010, and can be classified as a form of global policy diffusion. The establishment of NQFs was closely related to the resumption of vocational skills development as a focus in development cooperation (Maurer 2014). NQFs are particularly attractive for development cooperation, because they are intended to harmonise and systematise qualification

standards for all economic sectors of a country and for all qualification levels (Maurer 2014). The learning outcomes associated with NQFs should make learner qualifications transparent for employers and educational institutions. Furthermore, the clear allocation of learning outcomes within NQFs should improve the mobility of learners, and establishment of NQFs suggests permeability between qualification levels (Cedefop 2009). However, Allais (2010) found that although NQFs have been introduced in more than 100 countries, there is little evidence of their success. Allais (2014) later argued that this is due to reasons including a lack of involvement of stakeholders and educational institutions, as well as incompatibility of NQFs with informal economic sectors, which include a significant proportion of workers in many developing countries. Maurer (2014) focused on the implementation of a NOF in Sri Lanka, and also found that it had little influence on the actual structure of the qualification process at the operational level; for example, its introduction did not have any positive influences on the difficult transition between vocational and academic education. King (2014) focused on the origin of NQFs, arguing that they emerged within an Western culture, and are therefore difficult to transfer to settings with different framework conditions (see also Gessler and Peters 2020).

With regard to transfer of the dual vocational training system, clear parallels can be seen between negotiated transfer (shaped by comparative political science and education) and policy lending (shaped by comparative education) in the context of commercial vocational training exports. For example, development cooperation primarily pursues objectives such as poverty reduction or sustainable economic development in the host country (e.g. Schippers 2009; Jäger 2016); more specifically for the VET field, objectives include facilitating the transition from school to employment, matching the available skills of those leaving school with the needs of the labour market, and improving transparency within individual vocational training programmes and providers in a country (Maurer and Gonon 2014b). Possible obstacles to successful transfer or the sustainability of development cooperation projects are of great importance in the field of development cooperation. Lewis (2007) traced the development of the transfer of the German dual vocational training system – both to industrialised countries within the framework of voluntary transfer (policy drawing) and to developing and emerging countries within the framework of development cooperation (negotiated transfer). Lewis concluded that cultural differences between the transferring and receiving countries are the decisive factors determining whether or not the transfer is successful. Lewis also identified four forms of policy borrowing that may avoid disruptions due to cultural differences, and showed how these are similar to the differentiated forms of transfer within comparative political science (Rose 1991, 2005; Dolowitz and Marsh 2000).

Pilz (2016a) emphasised the importance of detailed analysis of the different needs and perspectives of all stakeholders involved, which vary depending on the regional framework conditions. To this end, he proposed a systematic country analysis based on a typology, and developed a multi-perspective approach that includes the skill formation approach and stratifications approach at the macro level, clarifies the degree of standardisation of VET at the meso level, and surveys the practice of learning at the micro level (Pilz 2016a). Pilz (2017) later built on his analysis of previous work and his own experience to develop the '6P' strategy for systematic analysis and adaptation of policy transfer. This strategy emphasises demand in the recipient country on the various system levels, and how these needs can conflict and must be negotiated to identify priorities for policy transfer (1: Priorities). Furthermore, the resources for implementing measures must also be taken into account – both monetary and material resources (2: Power), but also the quality of human resources, such as the qualifications of trainers (3: People). The strategy also takes into account the perspective of the companies providing training: the extent to which companies will actually benefit from the policy transfer in the long term, and the extent to which qualified personnel may migrate (4: Poaching). The strategy also focuses on the important role of recognising and certifying vocational training activities, and how these activities affect the local labour market and VET system (5: Progression). Finally, the strategy considers adequate working conditions and remuneration of participants, which make VET transfer activities more attractive (6: Privileges).

In their literature review regarding the transfer of dual training models in OECD countries, Valiente and Scandurra (2017) also stressed the great importance of contextual conditions. They argued that the involvement of employers, institutional capacity to monitor training activities, the reputation of VET, and the cooperation of social partners are all central challenges in transfer activities. Their broad literature was not specifically focused on the German dual training model; for a more specific focus on German VET export, see Krekel and Walden (2016).

Euler (2013) and Gonon (2014) both focused on the possible transferability of dual training systems abroad. Both explored this issue on a theoreticalconceptual level without going into a specific recipient country in detail, and both concluded that a complete transfer of a dual system abroad is not possible, but that certain elements can be transferred. Euler (2013) divided the dual vocational training system into eleven constituent elements that can be selected, adapted, and transferred by the recipient country in accordance with its framework conditions. In contrast, Gonon (2014) distinguished between dual systems and dual models, the latter being transferable. For example, Gonan argued that the 'spirit' of duality could be transferred, but that entire systems could not be changed. One example of an adapted model of duality still including the 'spirit' is the activities of the private education provider SENATI in Peru (Angeles and Lindemann 2020). Gonon (2014) also identified seven criteria that are necessary for the exportability of dual models. They are: 1) the willingness of companies to provide training, 2) the training activity of the

school, 3) the formalised model, 4) the reference to codified, scientific knowledge, 5) the cooperative model, 6) the practice-related model, and 7) the careerrelated model, Bliem, Schmid, and Petanovitsch (2014) analysed the fundamental challenges and success factors in the transfer of dual training structures. They emphasised the influence of the existing structures and traditions of the respective target country, especially the influence of companies (also see Langthaler 2015). Bliem, Schmid, and Petanovitsch (2014) concluded that dual structures can only be implemented in a promising and sustainable manner if companies benefit.

Wolf (2020) focused on transferability on a theoretical-conceptual level; he showed how the work-cultural background of vocational training can help reveal the multi-lavered context in which vocational training elements are embedded, and thereby help assess the chances of success of a training transfer (see also Wolf 2017). More specifically, Wolf broke down the production of goods and services that influence a country's specific VET system into six dimensions: 1) company labour regime, 2) labour law, 3) development and application processes of technology, 4) constitution of the social actor, 5) social security, and 6) administrative and institutional order.

In addition to these theoretical-conceptual discussions, some scholars have taken empirical approaches to explore vocational training cooperation. Schippers (2009) examined the Mubarak-Kohl Initiative in Egypt, which has been aimed at strengthening the Egyptian economy by training young people since 1996. Schippers applied an impact-orientated analysis model and found that a cooperative system of vocational training in Egypt is generally possible, but that some organisational structures that are not transparent pose major challenges to implementation. Schippers also noted that sustainability and selffinancing capacity must also be viewed critically; for example, quality was reduced after the withdrawal of German advisory services.

Stockmann (2019) conducted a meta-evaluation of 25 vocational training projects completed by the former Gesellschaft für Technische Zusammenarbeit, the German Development Service (DED), and Capacity Building International, Germany, to assess the effectiveness and sustainability of German vocational training promotion. Stockmann also developed an expanded model of key sustainability variables, which incorporates four decisive factors: flexible management, ownership, personnel, and system compatibility. Stockmann concluded that projects with a limited requirement profile were more sustainable than projects with a multi-level approach intended for broad-scale impact. He also noted that that projects tended to lack coordination between qualification offerings and the needs of the recipient economy, and further, that due to the concentration on formal vocational training, the informal employment sector was not taken into account. As a result, projects tended to have only a weak impact on poverty reduction.

Based on their practical experience, Strittmatter and Böhner (2019) developed a detailed matrix including success factors for the transfer in development aid projects with focus on vocational training. The result of the matrix is a modelling of the German VET system which is able to reduce its complexity in order to provide decision-makers and VET personnel in partner countries with initial access.

Beyond the development cooperation approach, few scientifically sound findings are available with regard to the export of VET. One exception is the analysis of numerous collaborative projects under the German Federal Ministry of Education and Research's (BMBF) Export of Vocational Training funding initiative (e.g. Kühn and Holle 2020; Peters, Gessler, and Kühn 2019; Frommberger, Vossiek, and Holle 2020; Leimeister and Klusmever 2020). The research institute Fraunhofer (2012a) identified both promoting and inhibiting factors for the export of VET offers from the perspective of German vocational training providers. It specified general competitive advantages and disadvantages, as well as ways to promote acceptance among target groups and cooperation with political actors. The Fraunhofer (2012b) also identified funding structures and funding approaches of Anglo-Saxon countries in the export of VET, such as the export potential of British, Australian, and New Zealand VET, along with policy measures to promote and improve the export of VET. Posselt et al. (2019) surveyed inhibiting and promoting factors; based on the results, they developed central building blocks of effective business models for the export of training services, including the development of customer-orientated certification models, the design of demand assessment, and the selection of suitable distribution channels (see also examples in DLR Projektträger 2019). In a comparative study of dual training modes in eight countries in Sub-Saharan Africa and Latin America, Frommberger, Vossiek, and Holle (2020) come to a very differentiated conclusion based on the five characteristics set by official German VET policy: 1. Joint responsibility of state, trade and industry and social partners, 2. Learning within the work process, 3. Acceptance of national standards, 4. Qualified vocational education and training staff, 5. Institutionalised research and consultation. The country-analysis based on the five characteristics shows that no unified development trends can be identified. On the one hand, the situations in the countries differ greatly, and on the other hand VET within all countries is very heterogeneously differentiated in terms of structure, administration and curriculum. Furthermore, the authors emphasise that besides the focus on dual training practices, other training models have been successfully established in many countries.

Fassbender and Pilz (2020) analysed the central didactic characteristics of technical learning systems of German education providers and their activities on the international education market against the background of a possible implicit policy transfer of dual vocational training. The results show that the learning

systems have German training elements at the micro level of teaching and learning and that these are transferred at the international level.

A number of other Western organisations are promoting and exploring the transfer of VET in the context of commercial interest. For example, the British City and Guilds Group operates more than 80 centres, delivering more than 60 vocational qualifications across 15 industry sectors in India (Freeman 2017a, 20). Freeman (2017b, 1) also analysed the potentials for Australian VET-providers in India and recommended the establishment of an Australian VET brand in India. Another example is the Australian Quality Training Framework (AQTF; also known as the National VET Regulation Standards), which has been transferred in the form of services to more than 45 countries since the 1990s (Dempsey and Tao 2017; Gessler and Peters 2020). Demosey and Tao (2017) used the Victorian public VET provider as a case study to examine the challenges of commercial transfer projects from Australia to China, and concluded that Australian quality assurance mechanisms are not suitable for the Chinese context. Specifically, they found that the Chinese vocational training market is expanding as a result of numerous broader reforms that are affecting the market, and as a result the Australian model is no longer simply being adopted, but is being modified to a great degree.

Although most comparative VET research has analysed transfer activities at the systemic level, some studies have focused on individual company levels, including those of Aring (2014), Pilz and Li (2014), Gessler (2017), Wiemann and Pilz (2020), Vogelsang and Pilz (2020), Körbel, Pierenkemper, and Zibrowius (2017), Wiemann (2017), Peters (2018), and Holle (2019). The authors of these scholars have explored the extent to which German multinational companies practice dual vocational training in their subsidiaries abroad, and how this can inform the transferability of German vocational training abroad. The findings have also revealed the strong influences of local conditions in this regard. For example, Wiemann and Pilz (2020) explored qualification strategies used by German multinational companies in India, Mexico, and China using both comparative VET research and applying the international human resource management perspective (see also Pilz and Wiemann 2020; Vogelsang and Pilz 2020; Fuchs 2020). They found that even in German companies in foreign countries, the dual training commonly used in Germany is only offered for a few specialists in some larger companies.

Gessler (2017) identified some relatively successful transfer activities, and found that the local context has led to significant differences in the way companies organise their training. In some ways, the term 'transformation' must be more applicable than 'transfer' (in this case, in the context of emerging cooperation between schools and companies; Flynn, Pillay, and Watters 2015 also explored transformation processes). Gessler (2019) later conducted an intensive case study on the introduction of dual training structures at a North American production plant of Mercedes-Benz, and identified four promoters for the success of innovative VET transfer: at the personnel level, the expertise of the specialist promoter is important to implement the policy; at the team level, the process promoter is important to implement the transfer; at the institution level, the power promoter is important to make the transfer decision; and at the system level, the relationship promoter is important to bridge the distance between policy giver and policy receiver.

Beyond development cooperation and the commercial dimension of the export of education, very few empirical studies have investigated policy transfer in VET. One of the few exceptions is an empirical study on policy transfer from Germany to China by Li and Pilz (2019), which differed from both development cooperation and the commercial export of education, and focused instead on a transfer experiment developed singularly for academic purposes. Ramasamy and Pilz (2019) also conducted a purely research-led transfer experiment from the competence-based approach of the curriculum for informal sewing skills training. They concluded that a competence-based curriculum approach in the informal sector is most effective when the targeted learners are directly involved in its planning and development. Bakirci and Pilz (2019) investigate the professional understanding of the so-called vocational training experts who plan, control and also implement the transfer in the partner countries. A very complex competence profile could be generated. The findings documented the need for a systematic and institutionally anchored professionalisation strategy in order to optimise vocational training cooperation in the long term.

Another example is the European Commission report on international cooperation in VET (2015). It presents reasons for international cooperation within the EU. The reasons given include to strengthen and promote, at international level, the positioning and recognition of countries' VET systems, qualifications and certificates; to strengthen the supply of a skilled and globally-aware labour force; to modernise their own VET systems.

Overall, this review of comparative VET research reveals that most studies have focused on the transferability of NQFs and dual training models. Research on the commercial exportability of a component of an education system has clear parallels with comparative education sciences. Its findings are also clearly interrelated with the findings of economic geography, because both focus on networks of actors and the important role of enterprises.

2.4. Transfer in human resource management and economic geography

The previous sections have generally discussed policy transfer on a systemic level or from an educational perspective; in contrast, literature on international human resource management focuses more on operational transfer strategies of multinational companies (e.g. Edwards, Colling, and Ferner 2007). The following discussion explores the transfer of strategies from one country to another, but it is more concerned with knowledge transfer and knowledge diffusion than

with policy transfer (Wiemann 2019; Wiemann, Ventura, and Fuchs 2019; Fuchs 2020). Dickmann and Müller-Camen (2006) introduced the term 'knowledge networking' in this context. Knowledge networking involves a direction of knowledge transfer, either unilaterally from a parent company and/or multilaterally from subsidiaries. Most research in this area has been limited to the influence of these strategies on corporate interests, such as competitiveness and personnel resource allocation, and rarely addresses social effects. Scholars mainly focus on the standardisation and diffusion of human resource policies (Chiang, Lemanski, and Birtch 2016; Dickmann, Müller-Carmen, and Kelliher 2009), specifically the tension between centralisation and decentralisation; i.e. the transfer of human resource strategies from a parent company in the country of origin (centralisation), and adoption of local strategies in subsidiaries (decentralisation). They have identified different types of strategies used within this area of conflict (Fuchs 2020). For example, Pudelko and Harzing (2007) distinguished between the strategies used by the parent company, local practices in real-world locations, and geocentric strategies implemented worldwide in all locations of a multinational company. Heenan and Perlmutter (1979) developed the EPRG typology approach, which distinguishes between four basic attitudes: ethnocentric (parent company), polycentric (local strategies), regio-centric (regional practices), and the geocentric (uniform global orientation).

As with other disciplines, international human resource management involves taking local conditions into account when deciding on strategy (e.g. Bartlett and Ghoshal 2000; Kostova 1999; Kostova and Roth 2002; Scott 2014; Stehle and Erwee 2007). However, compared with scholars working in VET research, scholars working in international human resource management are more likely to focus on knowledge transfer at the management level, and less likely to focus on the level of skilled workers (Zheng, Hyland, and Soosay 2007; Batt and Hermans 2012). Exceptions include Fortwengel and Jackson (2016), who specifically referred to skilled worker qualifications in their study of a joint dual training programme run by German companies in the USA that successfully overcame local hurdles. Another exception is Jürgens and Krzywdzinski (2015), who examined the development of competencies on the shop floor, and industrial upgrading, among automobile manufacturers in China. They built on this work by investigating the transfer of German and Japanese approaches to skilled worker training in Brazil, Russia, India, and China, using Volkswagen and Toyota as case studies (Krzywdzinski and Jürgens 2019 Jürgens and Krzywdzinski 2015). Most studies on the transfer of human resource strategies have focused on large multinational companies, because large companies are more likely to have the resources to implement human resource strategies transnationally in their subsidiaries (Wiemann and Pilz 2020). Small and medium-sized companies tend to be marginalised in this regard, partly because they are less likely to expand internationally, and also because training in smaller companies tends to be of secondary importance due to production pressure

and low staff numbers (Baumeler and Lamamra 2019). Chen and Yu (2012) focused exclusively on policy transfer within small and medium-sized companies, by examining the interplay between guidelines from a Taiwanese parent company and adjustment pressure within its subsidiaries in a host country. They found that managers from the parent company tended to be heavily involved in the operation of subsidiaries, and exerted strong pressure on them to adopt standard internal procedures – but that managers of subsidiaries who are subjected to this strong pressure tend to resist. Chen and Yu referred to this conflict related to strategies between managers of parent and subsidiary companies as 'institutional interaction' (Chen and Yu 2012).

In addition to the field of international human resource management, research from the discipline of economic geography can shed light on the transfer activities of multinational companies and their international value chain. This research tends to foreground the locations and internationalisation of knowledge (Fuchs, Schamp, and Wiemann 2016) and interactions between actors in selected locations. One good example is a study by Wiemann and Fuchs (2018), who investigated the Mexican model of dual vocational training, which was developed in close cooperation with German actors. Wrana and Diez (2016) also explored the influence of multinational companies on institutional structure in a host country, by focusing on the training programmes of multinational companies in Vietnam; they conclude that this does not have a sustainable impact on the local institutional landscape. In the context of economic geography, policy transfer is understood as a socially constructed field at a transnational level, which is characterised by power structures between actors (Peck 2011; Peck and Theodore 2010).

3. Reflections of the lines of discourse

This literature review has explored discourses about policy transfer in different disciplines to answer questions like what is transferred, how, and with what results, and which factors are decisive? Our analysis also yielded some general insights: first, discourse seems to differ depending on the authors' country of origin, and second, policy transfer appears to be motivated by four main goals.

a) Differences in discourse depending on the authors' country of origin

Comparative VET research conducted by German scholars and other Western scholars tends to differ. Anglo-Saxon literature deals mainly with policy transfer in a conceptual and critical way, for example exploring post-colonial and neoliberal phenomena (e.g. Singh 2001). In contrast, German VET research tends to focus on concrete empirical studies (e.g. Pilz and Wiemann 2020; Ramasamy and Pilz 2019; Posselt et al. 2019). One reason for this difference may be that German-speaking countries have a history of transfer to other countries, which is encouraged by the German government, particularly in the context



of dual training - which has led to many practical examples that need to be empirically evaluated (e.g. Agrawal 2013; Wiriadidjaja, Andriasanti, and Jane 2019). It is interesting to note that this phenomenon related to country of origin applied to some extent in all of the research disciplines explored above.

b) Motives and goals of the transfer

This literature review also revealed four main motives for the policy transfer: donor aid, state capacity-building, company capacity-building, and trainer capacity-building. First, we found that poverty reduction in the context of development cooperation was initially one of the most important motivations for policy transfer in all disciplines (e.g. Maurer and Gonon 2014b). Development policy continues to play an important role today (GIZ 2019). Recent research has also revealed that policy recipients themselves may act as policy donors in other countries (Barabasch, Petrick, and Park 2017; Niu and Liu 2016).

Second, support for the development of vocational training structures and the associated capacity-building is an integral part of foreign policy instruments, particularly among German-speaking countries. In addition to advice and support at the system level, great attention is paid to the development of pilot projects and the training of training personnel at the state level, especially in Germany (The Federal Government 2019). International labour mobility is very important on the political agenda; this may involve the professional training of skilled workers prior to an assignment abroad, as well as issues related to quality, skills, and recognition of qualifications (Federal Ministry of Education and Research 2019). The international trend towards the establishment of national qualification frameworks can also be seen in this context (Singh 2016; Allais 2010).

The third motive is related to the company level – specifically rapid technological changes and the need to boost international supply chains and production sites. The goal is to increase the global division of labour in multinational companies, leading to more transfer of training activities within companies to train skilled workers in-house or implement local training networks (Gessler 2017; Wiemann and Pilz 2020; Pilz and Wiemann 2020).

Fourth, VET transfer can be considered a business model. Training providers work directly on site and 'sell' VET as goods (Fraunhofer 2012a, 2012b); commercial providers develop learning materials and learning labs or training workshops that are sold to institutions abroad (Fassbender and Pilz 2020). Some consulting companies advise governments in regions including the Arab world and India, with the goal of establishing and sometimes actively supporting vocational training structures (Subramanian 2018).

Overall, the motivation for policy transfer tends to overlap and vary by discipline. In practice, motivation for policy transfer may involve a mixture of all four motivations identified above, but it is important to note that each motivation is subject to different actor logics (Munro 2009). It is obvious, for example, that a transfer is subject to different logics with regard to sustainability when it is a matter of commercial transfers, which are often very limited in time, or the long-term training strategies of multinational companies in the host countries. Scholars are interested in these logics themselves, but the appropriate interpretation and contextualisation of research findings on the topic of transfer in general is also a matter of great interest.

c) Different scientific discourses and their central statements

This literature review has clearly demonstrated that research about policy transfer cannot be neatly compartmentalised into specific disciplines. In particular, research on policy transfer in the field of international comparative VET research draws heavily from the theories and concepts of other disciplines. For example, Barabasch and Wolf (2011) drew from the theoretical policy borrowing model developed by Phillips and Ochs (2003), and Wolf (2020) drew on all of this work to develop a work culture model that includes VET. Pilz (2016b) drew from the EPRG typology developed by international human resource management scholars Heenan and Perlmutter (1979) to shed light on individual company transfer strategies. Peters (2018) drew from the activity theory developed by Engeström (1987). In contrast, it is noteworthy that scholars working in other disciplines tended not to refer to policy transfer work conducted by scholars working in the field of comparative VET research (e.g. Minbaeva 2005). This interesting finding points to both a weakness and a strength of comparative VET research. The weakness is illustrated by the many references to theories and concepts from other disciplines, revealing that international comparative VET scholars have developed few theories and concepts of their own, particularly with regard to policy transfer (Evans 2020). Exceptions include theories about the various typologies for international comparison (e.g. Green 1999; Greinert 2004; Pilz 2016a; Bosch 2017; Rageth and Renold 2019), as well as work on comparative methods (Lauterbach and Mitter 1998; Pilz 2012). However, the strength of comparative VET research culture is illustrated by how it moves beyond its own discipline and learns from lessons in other disciplines. This is related to the multifaceted nature of VET research, which involves systemic, subsystemic, and institutional issues.

Together, the literature suggests that with regard to vocational training, all forms of policy transfer are challenging. This includes attempts to transfer the dual VET system of German, Austrian, or Swiss character abroad (Langthaler 2015; Gonon 2014; Deißinger 2015). These challenges are not limited to policy transfer; they are typical when new policies are introduced in general, at home or in a host country. According the policy ecology approach developed by Weaver-Hightower (2008), the introduction of a new policy is similar to an ecosystem: it has different effects on the components of its environment. The complex cause-effect relationships are not linear and require a holistic analysis of all components: actors,

relationships, environments, structures, and processes (Weaver-Hightower 2008). Garavan et al. (2020) reached the same conclusion with regard to human resource management. Policy implementations may not always lead to the same result - they always involve adaptation processes within the specific framework conditions in a country. The complexity of VET systems means their outcomes or effects cannot be predicted precisely: research has consistently demonstrated that policy transfer efforts related to VET can fail due to unsuitable or unforeseen framework conditions including as economic development, the education system, labour market structure, sociocultural context, and the socio-political structure. Scholars across disciplines agree that a policy can never be directly transferred from a foreign context to a recipient country, and that even the transfer of a training culture (Pilz 2009), or individual training elements is not without problems. Establishing a training culture takes a lot of time (Gessler 2017) and even then, is not always successful. Nor does the transfer of individual training elements automatically quarantee success. Often it is the sum of the parts, and their interaction, that forms the basis for a successful and sustainable training strategy, both at a micro level (e.g. in a company) (Garavan et al. 2020) and at a system level (Pilz 2017, 486). This literature review has revealed that the research of policy transfer moves beyond the learning environments of school and company - it also explores a whole range of transfer elements on various dimensions of the educational eco-system, such as cooperation between stakeholders and the value of vocational training - from various and interconnected academic disciplines (Pilz and Li 2014; Gonon 2014; Pilz 2016a, 2017).

Finally, the topic of policy transfer has become increasingly important in the area of VET research in recent years. Within the context of globalisation and technological development, it is likely to continue to be very relevant in the future (Jürgens and Krzywdzinski 2015; Wiemann and Fuchs 2018). It will be important to continue to follow the discourses in the related scientific disciplines closely, and link them as intensively as possible.

Notes

- 1. This review does not consider comparative studies outside of policy transfer research, such as those from the fields of economics of education (Acemoglu and Pischke 1998) or convergence research (e.g. Lahiff et al. 2019; Green 1999). It also does not consider research on international mobility and training of nurses and other healthcare workers, as this is generally an indirect transfer: they are trained in the countries of origin exclusively for destination countries with only minor effects on the vocational education systems in two countries (Walton-Roberts 2020).
- 2. Here, vocational education and training is understood as formal, non-formal, and informal forms of pre-vocational, initial vocational, and further vocational training for the qualification of skilled workers at the intermediate qualification level (e.g. Maclean

and Lai 2011). This is in contrast to other reviews focusing on hybrid forms of vocational education and training intended to facilitate the transition to higher education, rather than training for the labour market (e.g. Graf et al. 2014).

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