

Global Skills Partnerships

**Exploring Transnational
Education in TVET**

October 2025



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This research is part of the British Council Going Global Partnerships programme, which supports universities, colleges and wider education stakeholders around the world to work together towards stronger, equitable, inclusive, more internationally connected higher education and technical and vocational education and training (TVET) systems. Through international partnerships, system collaborations and opportunities to connect and share, we enable stronger transnational education, more collaborative research, higher quality delivery, enhanced learner outcomes and stronger, internationalised, equitable and inclusive systems and institutions.

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About Edge

The world is changing fast and education needs to keep up. Edge is an independent, politically impartial education foundation. We want education to be relevant to the twenty-first century. We gather evidence through research and real world projects and partnerships and use this to lead the debate and influence policy and practice.

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The Association of Colleges (AoC) is the national voice for further education (FE), sixth form, tertiary and specialist colleges in England. We are a not-for-profit membership organisation established in 1996 by colleges, for colleges. Our members make up more than 90% of the sector, educating and training 1.6 million people each year.

As a membership body we:

- Influence government and local and national policymakers to create the environment for strong and sustainable colleges at the heart of the economy
- Provide high quality professional support, advice and intelligence to meet the needs of every member
- Champion and enhance the reputation of colleges, leaders, staff and students.

Research is right at the heart of the Association of Colleges' work as we campaign on behalf of the sector and support it in an evidence-based manner. The AoC Research Unit produces outstanding research based on data provided by the FE sector, but also showcases work carried out in partnership with leading research institutions. Its aim is to help promote more research into FE and colleges, bring researchers together to share and shape ideas, promote more practitioner research and share that work inform post-16 teaching practice and policy development.

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The views and opinions expressed in this report are those of the expert team and do not necessarily reflect the official policy or position of the British Council.

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Foreword

Technical and vocational education and training (TVET) plays a vital role in preparing people for employment, entrepreneurship, and lifelong learning. Across the globe, TVET systems are central to tackling unemployment, building more inclusive economies, and responding to the green and digital transitions shaping our societies. Yet, while transnational education (TNE) has been widely studied in higher education, its role and potential within TVET remain underexplored.

In 2023, the British Council launched its TNE strategy to strengthen data and insights, create enabling environments, and foster partnerships that support high-quality UK TNE worldwide. At the time of this report's launch, a refreshed version of the strategy is being introduced. This research, the first commissioned by the British Council to focus exclusively on TNE in TVET, addresses a critical knowledge gap by providing timely insights into models, opportunities and challenges, and offering evidence-based recommendations for policymakers, institutions, and partners.

We are particularly grateful to Edge Foundation, who, in partnership with the Association of Colleges, took on the challenge of exploring this complex and under-researched area and have produced such an insightful and timely report.

This research demonstrates that TNE in TVET offers significant potential: from expanding access to high-quality skills training, to supporting the internationalisation of TVET systems, to strengthening pathways into employment. At the same time, it highlights the importance of contextualisation, adaptation, and mutual learning when transferring programmes and policies across borders.

The British Council, through its Going Global Partnerships and wider TVET work, is uniquely placed to support this agenda. With its global presence, trusted networks, and long-standing role as the UK's cultural relations organisation, it is committed to supporting UK and international partners to realise this potential, building stronger and more resilient skills systems worldwide.

I am delighted to introduce this report to all who are committed to shaping the future of skills and education through international collaboration.

Dr. Rossi Vogler

Global TVET Lead, British Council

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Glossary of terms and abbreviations

AO – Awarding organisation

DfE – Department for Education

FE – Further education

HE – Higher education

HEI – Higher education institution

Host (or receiving) country – the host country is the country where the educational programme is delivered, or is the recipient of the provision, distinct from the country of the awarding institution

ITP – Independent training provider

IES – International Education Strategy

LND – Local Needs Duty

MPM – Managing Public Money

NCVER – National Centre for Vocational Education Research [Australia]

NI – Northern Ireland

OU – Open University

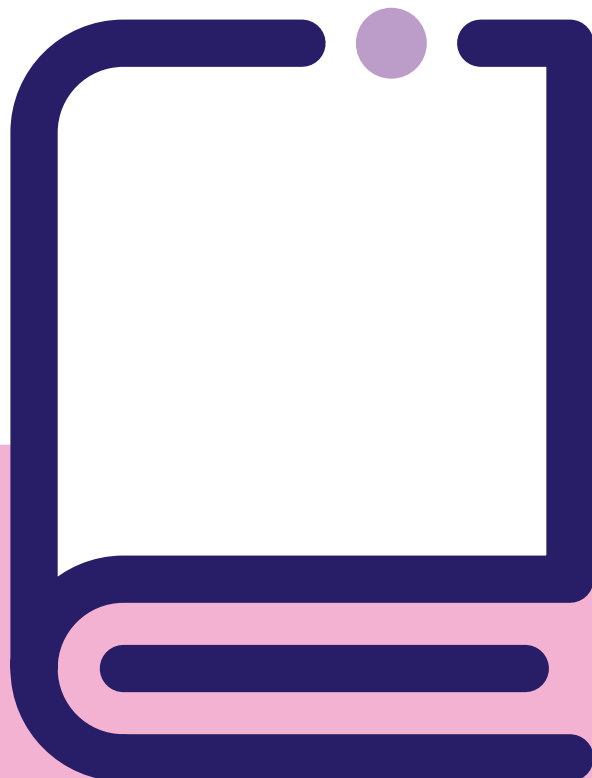
Sending/provider country/institution – the institution or country that is providing the programme *[in this report this is mostly a UK institution]*

SEEP – Scottish Education Exchange Programme

SQA – Scottish Qualifications Authority

TVET – Technical and vocational education and training

TNE – Transnational education



Executive summary

This research examines transnational education (TNE) in technical and vocational education and training (TVET), commissioned by the British Council in partnership with Edge Foundation and the Association of Colleges (AoC). While TNE is well-established in UK higher education, its application in the further education¹ (FE) sector remains nascent but holds significant potential for global skills development, international collaboration and strengthening UK provision.

Research on TNE within the TVET sector remains notably scarce. While a few studies from Australia offer insights into outcomes and challenges—such as the need for contextualisation and access to high-quality staff—comprehensive evidence is limited.

There is limited systematic data collection on TNE activity in the FE sector in the UK, unlike higher education which has comprehensive tracking. Available, yet incomplete, data comes from occasional surveys and studies with inconsistent definitions and methodologies.

Against this backdrop, this research aims to identify and explore characteristics, outcomes, challenges and future opportunities of transnational education in the TVET sector in the UK. The following questions were explored:

- What are the characteristics of (former and current) TNE models in TVET in the UK?
- What can be learned from international practice?
- How is TNE perceived and experienced by providers and policy makers, in terms of success factors, challenges, and impact of TNE in TVET?
- What are the possible future trends in TNE given current global and local political, social and environmental contexts?
- What are the policy and operational recommendations for implementing effective TNE models in TVET, particularly in low-and middle-income countries?

Methodology

A mixed-method approach was used. First, a sector and data scan identified UK TNE models using sources such as college/independent training provider websites, existing contacts, AoC's international survey, grey and academic literature, and expert referrals via snowballing. This was followed by 18 semi-structured interviews (April–July 2025) with UK colleges, awarding organisations, policymakers and international experts, recruited through partner networks and literature mapping. Interview data were thematically analysed using NVivo (Braun & Clarke, 2006).

Findings

Types of TNE in TVET

The research reveals that TNE in TVET operates through diverse and flexible models that differ significantly from traditionally accepted approaches. TVET TNE is exemplified by:

- **Franchise arrangements** – a common delivery model, where UK providers or awarding bodies accredit programmes delivered by host institutions overseas. UK providers often provide the delivery resources, quality assurance and sometimes the teacher training.
- **Bespoke and joint programmes** that respond to specific skills needs either for an employer, government or institution. These demonstrate TVET's unique agility to respond to local skills needs.
- **Hybrid staffing models** including 'flying faculty' arrangements, local partner training, and dedicated international teams based in UK colleges that support TNE set-up and delivery.
- **Flexible delivery methods** encompassing in-person, online and blended approaches, often including short-term intensive programmes either in the host country or on UK campuses.
- **Popular subject areas** include hospitality, engineering, aviation, maritime, construction and emerging green skills.

¹

In the UK, further education includes any study after secondary education that's not part of higher education (that is, not taken as part of an undergraduate or graduate degree).

Motivations and outcomes

- **Capacity building:** TNE programmes effectively develop host country skills, it can transform pedagogical practices and support economic transitions. Participants noted strong impacts on teacher training and entrepreneurship development, with outcomes including addressing skills shortages and economic development.
- **Internationalisation:** TNE provides valuable opportunities for both domestic and international students to develop global perspectives and enhanced employability. Staff benefit from professional development through exposure to different teaching methodologies and cultural contexts.
- **Political engagement:** Successful TNE partnerships can influence national policy overseas and support systemic education reform in host countries.
- **Income diversification:** TNE can provide significant funding to support UK students and delivery back home.
- Additionally, **UK FE institutions serve as cultural ambassadors**, promoting British educational values and building international relationships. The combination of English language instruction and high-quality technical training creates particularly strong soft power effects.

Challenges

- **Financial barriers:** A significant obstacle to TNE expansion is insufficient start-up funding. Colleges can struggle to access capital for initial market entry. Additional financial challenges include complex international payment systems, currency fluctuations, volatile market conditions, and sudden withdrawal of government funding in host countries.
- **Administrative complexities:** TNE requires navigation of diverse bureaucratic systems, visa requirements, procurement processes and quality assurance processes across multiple regulatory frameworks.
- **Political risks:** Geopolitical instability poses ongoing challenges to TNE sustainability. Changes in government policy, diplomatic relations and security situations can terminate programmes with little notice.
- **Staffing constraints:** Recruitment of qualified technical staff willing to work internationally can be problematic. There can also be challenges with the recruitment and deployment of staff including contractual restrictions on using domestic teaching staff, security and cultural concerns, and visa restrictions.

Opportunities

- **Growing TVET demand:** There is a growing international recognition of TVET's importance for successful economic development, where there are requirements for technical skills and growing emphasis on lifelong learning and future-focused skills including green technologies and digital competencies. Simultaneously, rising graduate unemployment is creating demand for practical, employment-focused education, with arguably changing student preferences towards shorter, practically-oriented programmes.
- **Digital innovation:** Technological advances are expanding TNE delivery possibilities through AI, virtual reality and augmented reality which can enable remote practical training. Hybrid models can combine online preparation with intensive face-to-face delivery, or virtual master classes can connect learners across geographical boundaries. The development of micro-credentials and flexible learning pathways also offer growing opportunities to support lifelong learning.
- **Strong reputation:** The UK's excellent educational reputation in TVET provides a strong foundation for expansion, though significant untapped potential exists. Only a small proportion of the UK's colleges are currently active internationally, suggesting substantial room for growth. Growing areas of interest for many countries in fields such as green technologies and health and social care, where the UK and Europe are seen to have particular expertise, provide potential areas for expansion.

Conclusion

TNE in TVET represents a significant opportunity for the UK's FE sector to contribute to global skills development whilst fostering long-term, mutually beneficial partnerships. Success requires patient relationship-building, adequate financial support and recognition of TVET's unique characteristics and contributions. With appropriate policy support and investment, the UK's FE sector could substantially expand its international footprint and impact, supporting both domestic institutional sustainability and international development objectives.

The growing global recognition of TVET's importance, combined with technological advances enabling new delivery models, creates a favourable environment for expansion. However, realising this potential requires addressing challenges of funding, staffing and regulatory complexity that can limit sector participation in international markets.

Introduction

Transnational education (TNE) is an important aspect of the UK's higher education (HE) sector, providing income for UK institutions and exerting cultural and educational influence. However, TNE activity in technical and vocational education and training (TVET), particularly in the further education (FE) sector, in the UK is more nascent, less widespread and where it is happening, less prominent.

The British Council commissioned Edge Foundation and the Association of Colleges (AoC) to examine TNE models in TVET, identify practices, and provide actionable recommendations for policymakers, practitioners and stakeholders in TVET systems globally. The report acts as an opening chapter to document TNE in TVET delivery and provide a

framework to explore and expand further activity. In particular, interest was placed on investigating the TNE activities of FE colleges, awarding organisations and other providers.

The report provides an overview of the literature and policy context of TNE in TVET, before describing the methodology used in the research. The findings begin by describing and categorising the TNE activities explored in the research, it then presents the themes that have emerged from interviews with experts and practitioners, covering the value and outcomes of TNE activities, the challenges and the opportunities. It concludes with recommendations for practitioners, policymakers and other actors in the TNE space.



Literature review

Reflective of higher education's prominence in the TNE space, most literature on TNE also mainly focuses on HE, both within the academic and grey literature. Despite mostly describing the HE context, many of the definitions and models of TNE are useful for applying to the TVET sector as a starting point to outline the research framework and to act as a comparison point. The literature highlights that the UK has a strong and well-established reputation in TNE when it comes to HE, which has dominated the global TNE market (Healey, 2020).

Definitions of TNE

Definitions of TNE are varied and evolving. An early definition was 'any teaching or learning activity in which the students are in a different country to that in which the institution providing the education is based' (Global Alliance for Transnational Education, 1997, p.1). Since then, definitions have evolved to include/exclude particular models and add clarity to produce a more nuanced definition. For the purpose of this research, the [Council of Europe / UNESCO](#) (2022) definition was adopted as a starting point:

All types of higher education study programmes, or sets of courses of study, or educational services (including those of distance education) in which the learners are located in a country different from the one where the awarding institution is based. Such programmes may belong to the education system of a State different from the State in which it operates, or may operate independently of any national education system.

Given that the definition applies to HE, a degree of flexibility was given when considering models of TNE in TVET, since no definition was found which currently applies specifically to TVET.

When considering the approaches TNE can take, Knight (2015) underlines two major ways which tend to cover all TNE. The first is **independent** provision, whereby the sending provider is primarily responsible for the design, delivery and external quality assurance of their academic programmes and qualifications being offered in another country. Alternatively, the TNE may take a **collaborative** approach where the sending provider and host country provider work together on the design, delivery and/or external quality assurance of the programmes.



Many reports also define the categories or modes of programme delivery – these can include where the learning takes place (e.g. distance learning or on campus in host country) and who is both designing and delivering the learning (e.g. sending provider or host provider/country). Knight (2017) discusses these clarifications (see Table 1 for details), and they have been adopted by the British Council as common classifications for international programme and provider mobility (as opposed to student mobility, i.e. students moving to the country of the foreign education provider). These classifications will likewise be adopted by the UK from 2026/27 for collection of HE aggregate offshore data records, as [collected by HESA](#), the UK's higher education statistics agency. The following Table 1 is taken from the [British Council/DAAD](#) report (2017, p.16) and refers to HE:

Table 1: Common TNE Classification Framework for International Programme and Provider Mobility (IPPM)

Common TNE Classification Framework for IPPM	
Two major approaches to TNE provision – independent and collaborative	
Independent TNE provision The foreign sending HEI/provider is primarily responsible for the design, delivery and external quality assurance of their academic programmes and qualifications being offered in another country.	Collaborative TNE provision A foreign sending HEI/provider and host country HEI/provider work together on the design, delivery and/or external quality assurance of the academic programmes.
Six categories of IPPM	
1. Franchise programmes Description: The foreign sending HEI/provider has primary responsibility for the design, delivery and external quality assurance of academic programmes offered in host country. The qualification is awarded by a sending HEI. Face-to-face, distance and blended education can be used. Commonly used terms: <i>import/export, validation, foreign, non-local, international private programmes</i>	4. Partnership programmes Description: Academic programmes in host country/ies are jointly designed, delivered and quality assured through collaboration between host and sending country partners. The qualification(s) can be awarded by either or both host and sending country HEIs in the form of single, joint or double/multiple degrees. Face-to-face, distance and blended education can be used. Commonly used terms: <i>joint/double/multiple degrees, twinning programmes</i>
2. International branch campus Description: A satellite bricks and mortar campus established by foreign sending HEI in host country. Sending parent institution provides curriculum, external quality assurance, and awards the qualification. Face-to-face, distance and blended education can be used. Commonly used terms: <i>satellite, private international, offshore campus, portal campus</i>	5. Joint university Description: An HEI co-founded and established in host country involving both local and foreign sending HEI/ providers who collaborate on academic programme development and delivery. Qualifications can be awarded by either or both host and sending country HEIs. Face-to-face, distance and blended education can be used. Commonly used terms: <i>co-developed, bi-national, co-founded, multinational, joint ventures universities</i>
3. Self-study distance education Description: Foreign sending distance education provider offers academic programmes directly to host country students. No local academic support available. Qualification, curriculum and external quality assurance offered by foreign sending HEI. Commonly used terms: <i>fully online education, open university, MOOCs, pure distance education</i>	6. Distance education with local academic partner Description: A foreign distance education HEI/provider offers programmes to host country students in collaboration with a local academic partner. Curriculum can be jointly developed and the qualification awarded by foreign HEI or by both partners. External quality assurance provided by foreign sending HEI/provider or both partners. Commonly used terms: <i>online or distance education with reference to local academic partner</i>

(Knight, 2017)

This classification framework will help guide the research when considering the different types of TNE activities in TVET. It will be used to draw out commonalities and differences from what is observed in TVET in the findings section.

Definitions of TVET

Similarly to TNE, definitions of the TVET sector are explored for the purpose of this research. UNESCO, in their recommendations concerning TVET, express TVET as 'comprising education, training and skills development relating to a wide range of occupational fields, production, services and livelihoods' (2016, p.5). Cedefop, as the leading organisation for TVET in the EU, share a similar definition, again highlighting the application to particular occupations, they define TVET as 'education and training which aims to equip people with knowledge, know-how, skills and/or competences required in particular occupations or more broadly in the labour market' (Cedefop, 2017, p.11). Such broad definitions can apply to many levels of study and sectors, and can easily be applied to activity taking place at universities within the HE sector. Indeed Adick (2018) describes the overlapping nature of TVET with university delivery as 'tertiary' education, which can be seen, depending on the country, for example as technical academies/ polytechnics. They go on to explain that TVET:

depending on the national education systems it is sometimes (partly) included, sometimes (partly) excluded from the compulsory education system, which means that it would range either as formal or as non-formal education (Adick, 2018, p.127).

UNESCO go on to outline TVET as traversing many stages of the education and training system and highlight its prominence as a part of lifelong learning, suggesting it can:

take place at secondary, post-secondary and tertiary levels and includes work-based learning and continuing training and professional development which may lead to qualifications. TVET also includes a wide range of skills development opportunities attuned to national and local contexts (UNESCO, 2016, p.5).

Given the broad and complex nature of TVET and where and how it can take place, for the purpose of this research we look at TVET taking place in FE colleges, independent training providers and in the workplace. We therefore exclude universities, despite some TVET activities taking place in universities across the UK. However, as we have discussed, the university sector has been well-researched when it comes to TNE.

Benefits and challenges of TNE

As nations seek to enhance their human capital development through international partnerships and knowledge transfer, the challenges and opportunities inherent in cross-border TVET delivery have become increasingly evident. The literature on TNE offers insights into the system level benefits it can have for host countries as well as the challenges faced by both provider and host countries. The

benefits of TNE include filling skills shortages, particularly in developing countries, as well as broad social and economic impact on the regional development (Tayyaba, 2018). TNE offers individual students the opportunity to study high quality and internationally recognised TVET qualifications whilst avoiding costly overseas study and travel. It also enhances career prospects by providing a global perspective and cross-cultural skills valued by employers.

However, challenges are far-reaching across all partners, including issues around financing, ongoing business and administration management (Shanahan and McParlane, 2005), and ensuring quality is maintained, which if not, can lead to for example, reputational damage to the provider institution or country (Healey, 2020). This concern around quality assurance can stem from conflicting regulatory frameworks, potential 'trust gaps' between institutions, and the risk of academic standards being compromised by commercial pressures. Inadequate facilities, outdated equipment and a shortage of qualified instructors in host countries also pose significant hurdles to delivering high-quality TVET. The persistent issue of negative societal perceptions of TVET can also present difficulties for TNE in the sector (Toepper et al., 2021).



Literature from abroad: The Australian and European context

Learning from Australia

Some of the existing research on TNE in TVET has emerged from Australia, where a moderate body of literature exists. Australia has emerged as a significant player in the transnational delivery of vocational education, with its well-developed TVET system serving as a foundation for international expansion. King (2024) articulates the rationale for Australian TNE in TVET, emphasising how the expansion of quality programmes to other nations supports human capital development in partner countries. However, this expansion is not without complications, as Australia's strict mandatory curriculum requirements may create a disconnect between formal curricula and the specific needs and aspirations of recipient countries, which possess distinct industries, values, practices and standards. Therefore, TNE must be contextualised for the receiving country, not only for diverse student populations but also for countries' economic and cultural context.

The tension between standardisation and localisation emerges as a central theme in the Australian literature. Wooley (2008) identifies that the fundamental challenge facing TVET institutions is balancing academic equivalence with meaningful contextualisation for diverse student populations. This balance requires careful navigation to ensure that programmes maintain their quality and recognition while remaining relevant to local contexts and labour market needs.

The role of teaching staff

The literature places considerable emphasis on the pivotal role of teaching staff in successful TNE delivery. King (2024) argues that teachers bear the primary responsibility for enacting curriculum in culturally sensitive and contextually relevant ways. However, this task is both demanding and complex. This responsibility becomes particularly challenging when many instructors are Australian nationals with limited understanding of local social, political and cultural nuances of the receiving country. Therefore, teaching quality and curriculum enactment varies significantly with individual teachers' knowledge of local contexts.

To address these challenges, two critical requirements for teaching staff were identified: first, they need support to develop an extended understanding of situational factors before attempting to address them; second, they require the capacity to influence outcomes through

effective decision-making and problem-solving. This involves them attempting to adapt the original Australian curriculum appropriately to the local circumstances, whilst still maintaining its original quality (King, 2024). Karthigesu (2007) further emphasises that teaching delivery staff must ensure both culturally appropriate delivery and assessment strategies while maintaining the quality and integrity of the Australian TVET system. This dual responsibility necessitates appropriate training and regular monitoring and assessment of teaching staff.

Data collection and monitoring systems

Australia has established systematic approaches to understanding and monitoring offshore TVET delivery. The National Centre for Vocational Education Research (NCVER), commissioned by the Australian Government's Department of Education and Training, conducts annual surveys of public VET² providers engaged in offshore delivery. In 2014, 51 Australian public providers of VET were identified and approached by NCVER to participate in the collection of data relating to offshore VET delivery. This allowed for a comprehensive picture of the providers active overseas, the programmes they delivered and the students who enrolled in those programmes. The 2014 survey defined VET programmes as:

programs [sic] leading to an Australian Qualifications Framework (AQF) qualification in the VET sector (award programs) and non-award programs delivered to students located in another country (and who are not normally based in Australia) (NCVER, 2014, p.10).

The definition shows the type of programmes that are delivered in the TVET sector, or at least measured, appear to be most closely aligned with the franchise programme model rather than being bespoke programmes. The survey goes on to report that in 2014 offshore VET programmes were delivered in 34 countries by Australian public VET providers, with the Asia-Pacific region being the main market.

The [Australian Government website](#) now displays some summary data for the latest year (2023) and trends going back to 2018. The data shows that in 2023, there were 21,970 VET students at offshore locations (21,745 international + 225 domestic), which accounts for 7% of total international students studying Australian VET courses (i.e. with 93% of international students are studying 'onshore' in Australia), an 8% increase from 2022. Also interesting is that 70% of these offshore VET students were studying part-time, suggesting flexibility in delivery models to accommodate local circumstances and student needs.

² NCVER report on 'VET' activity and therefore the term is used here when discussing the Australian context, rather than TVET which is used elsewhere in this report.



NCVER also continues to collect and [share data](#) on offshore enrolments. The data shows that ‘management and commerce’ is consistently the most popular field of education for offshore programmes, with ‘food, hospitality and personal services’ being a growing and popular field of programmes. The data includes a breakdown of student characteristics, such as gender and age group, and some information on programme attributes. They do note however that some data on training activity delivered in offshore locations are likely to be missing as it is not known whether providers have reported all their activity. Nevertheless, this attempt at systematic data collection approach provides valuable insights for understanding the scope and trends in TNE delivery, offering lessons for other nations seeking to develop similar monitoring frameworks, particularly with a national-level provider survey.

Given that Australia seems to have made headway, this research includes a country expert from the sector in the stakeholder interviews.

European experiences

The literature on European approaches to the transfer of TVET, particularly the transfer of the German dual system, can provide helpful insights to the potential and pitfalls of cross-border vocational education models, which can inform potential TNE delivery. International development offers multi-decade experience of delivering technical assistance projects in TVET, and whilst not an example of TNE as such, it can offer valuable lessons of TVET transfer to low and middle-income country

contexts. Bohra and Meckmann (2025) examine the ‘transfer’ of Germany’s widely praised dual vocational training system to West Africa, highlighting significant structural differences between the two regions that create barriers to successful implementation. The [dual training system in Germany](#), similar to the apprenticeship system present in the UK, combines training in a vocational school and training in the workplace. The ‘transfer’ of European TVET models to different contexts can face multiple challenges. For example, Bohra and Meckmann (2025) identify ‘excessive bureaucracy in European-led TVET projects, making project execution [in the receiving country] cumbersome and inefficient’ (p.71). Thus, showing the need to contextualise processes that can flexibly work within different systems.

TVET’s close proximity to work and jobs generally necessitates employer engagement. However, the level of employer engagement varies considerably across different countries. The literature identifies limited employer engagement as a critical challenge for dual TVET systems. Some countries, like Germany and Denmark, have a history and a culture of engaging with employers and unions in TVET. Other countries, where dual TVET is relatively new, employers often show lower commitment to long-term training partnerships, for example due to financial constraints. This challenge is compounded by the lack of established accreditation frameworks, resulting in uncertified skills training that lacks formal labour market recognition, which acts as a significant barrier to employment and career progression.

Cultural misalignment can emerge as a complex challenge in the transfer of TVET, which must be understood and appropriately managed. The literature indicates that different values between global competency-based models and African educational traditions must be appreciated, and appropriate adaptations should be considered (Odoch et al., 2022; Stone et al., 2020). For instance, while European TVET systems encourage self-directed learning and industry engagement, some African educational traditions often emphasise teacher-led instruction and hierarchical structures (McGrath, 2023).

Gender equity represents another area where cultural barriers might be faced. Although European models integrate gender-equity policies, Gewer (2021) suggests these strategies often fail to translate effectively in their research in West Africa, due to deep-rooted sociocultural norms that discourage female participation in some technical professions. Similarly, disability inclusion remains an overlooked dimension in TVET transfer, with limited investment in adaptive learning materials, specialised teacher training, and infrastructure improvements leaving vocational education inaccessible to many potential learners.

Financial sustainability emerges as a fundamental concern, with donor involvement often prioritising visibility and short-term outputs over sustainability and systemic fit, thereby reinforcing shallow adoption rather than deep, sustainable change. These nations require long-term financial stability to avoid creating donor-dependent systems that cannot sustain themselves once external funding ceases.

Despite the challenges, the literature identifies several factors that contribute to more successful TVET implementation from the European context which reflect findings from the Australian literature. Capacity building for educators and trainers represents a critical success factor. Training initiatives that provide competency-based instruction methods and exposure to modern industrial practices may support the development of TVET trainers who lack industry-specific training (Haseloff et al., 2017).

Policy transfer

The definition of TNE has been evolving over time, reflecting technological advancements and an increase in the scope of TNE activities. What has remained constant, however, is the cross-border, cross-jurisdictional nature of programme and service delivery – an aspect also signalled by the term ‘transnational’.

In international work, whether research, practice, or policy development, certain key processes are

frequently discussed in the literature. These are usually linked to policy development but are also relevant to practice. They include policy borrowing (e.g. Phillips and Ochs, 2003), policy learning (e.g. Raffe, 2011), policy transfer (e.g. Crossley, 2019), and policy referencing (e.g. Forestier et al., 2016). These processes are highly relevant in TVET TNE, as Kersh & Laczik (2021) argue that in adult education, there is a complex interdependency between policy and practice.

Within TNE in TVET, the more specific focus is on delivery. However, TVET delivery can influence policy. It is argued that policy development should be based on evidence (Laczik et al., 2023), and in this context, TVET TNE activities can serve as an evidence base. Alexander et al. (2000) classify this as ‘learning from abroad’.

The key question is: How can a TVET programme developed and delivered in one country be successfully transferred and implemented in another? The concepts of ‘learning’, ‘borrowing’, and ‘transfer’, along with the thought processes behind them, may offer a valuable way forward when TVET delivery occurs across borders. Notions such as contextualisation, adaptation, and tailoring are essential for the successful implementation of TVET TNE activities. Recognising cultural, societal, political and economic differences is a vital first step, and these factors should be carefully considered and reflected in TVET programmes developed and delivered in/for the host country. Similarly, if TVET delivery staff are from the home country, they should be trained to be culturally sensitive when working with TNE students. These considerations are essential for the success of TVET TNE activities.

In this context, the British Council is well positioned to act as a bridge for effective policy transfer in TVET TNE. As the UK’s cultural relations organisation, it combines long-standing expertise in facilitating education partnerships with an extensive on-the-ground presence, strong networks, and trusted relationships in partner countries. This enables the British Council to help UK providers navigate the complexities of contextualisation, adaptation, and cultural sensitivity that are essential for successful programme transfer. Through initiatives such as the Going Global Partnerships programme, the British Council creates platforms for mutual learning and collaboration between UK and international TVET institutions. In doing so, it supports evidence-based policy development, capacity building, and system improvement, helping ensure that TVET TNE activities are not only delivered effectively across borders but also embedded sustainably within local policy and practice. [The UK Skills Partnership](#) is also a critical organisation for supporting the UK’s TVET presence globally and extending its reach, in a sensitive and sustainable manner.

UK policy context

The main policy context for the UK relevant to TNE activity in TVET is the 2019 [International Education Strategy](#) (IES), developed in the wake of the UK leaving the European Union (completed in 2020) and in light of the expectation that 90% of global economic growth would originate outside Europe.³ The strategy had the ambition to grow annual education exports to £35 billion by 2030.⁴ The target was predicated on an annual growth average of around 4%, from a starting point of around £20 billion. The strategy also highlighted the value of educational export in terms of soft power and the development of global relationships to support reform of educational systems for example. The target for the UK included a strong emphasis on the importance of TNE and TVET and aimed to address barriers to increase market share on the global stage, including recognition of qualifications and regulatory barriers. The 2021 [IES update](#) positioned itself in recovery mode following the Covid-19 pandemic, which had significant impact on the global education sector. The update highlighted the need to explore a potential expansion of online learning as part of the TNE offer. The IES represents UK government policy and not that of the devolved administrations.

In February 2024, the Scottish government published its inaugural [International Education Strategy](#) (IES), aimed at enhancing Scotland's global educational footprint. The strategy is seen as an important part of creating an inclusive, diverse education environment, promoting knowledge transfer and shared experiences. To support the strategy, the Scottish government, in collaboration and co-investment with Universities Scotland and Colleges Scotland through Connected Scotland, is jointly funding specific international campaigns and promotions aimed at boosting global recognition of Scotland's international education brand. Whilst the strategy highlights over 60% of Scottish university and college providers report TNE activity, and emphasises Scottish universities export earnings, the strategy's principal ambitions present scope to grow TNE further and equally applies to FE colleges

delivering Scottish qualifications outside of Scotland. The Scottish Qualifications Authority (SQA) a non-departmental public body of the Scottish government, works collaboratively with the Scottish government to develop the Scottish education brand. They accredit TNE TVET programmes delivered by providers in host countries for direct entry into the local workforce, or for student mobility by mapping SQA TVET diploma qualifications to degree progression routes in the UK and globally.

Wales launched its [international strategy](#) in January 2020 with a focus on setting out three core ambitions until 2025: to raise the profile of Wales on the international stage; to grow the economy by increasing exports and attracting inward investment; and establishing Wales as a globally responsible nation. The strategy develops the themes of the core ambitions through the concepts of people, product, and place, with education (particularly HE) woven through the strategy to support achieving its core ambitions. However, there is no specific reference to the role of transnational education for the country's 15 FE colleges and nine higher education institutions (HEIs) (including OU Wales). A recent report by [Universities Wales](#) (March 2025), aimed in part at supporting the work of Medr (Wales' new Commission for Tertiary Education and Research), highlighted the need for the development of a separate International Tertiary Education and Research Strategy for Wales, as well as the appointment of an International Education Champion, and closer engagement with UK government to deliver an immigration policy that aligns with Wales' needs. There is also the recommendation to improve the collection and quality of data, notably in the FE space.

The Welsh government has also invested in international educational exchanges for Wales through its Taith programme, which was launched in 2022 and will run until 2026. The programme aims to create opportunities across the whole of the education sector for people in Wales to learn, study and volunteer all over the world. Taith has funded

3

At the time of publication, the UK government are reviewing the IES and are due to publish an updated version later in 2025.

4

In terms of the 2019 IES education 'export' encompasses a range of international activity including early years, independent schools, further education and colleges, higher education, transnational education, education services, education technology and English language training.

Global Wales, which brings together universities and colleges within a single strategy to increase the international profile, recruitment and partnership opportunities for universities and colleges for the benefit of students, institutions and the country as a whole.

There has been limited recent policy development on internationalisation in Northern Ireland (NI) overall. In 2017, InvestNI (a UK government agency for regional business development) published its [International Strategy 2017-2021](#), with a key focus on supporting SMEs to play a larger role in export. There is no mention of education in the strategy. The [2014 International Relations Strategy](#) acknowledges the role NI education could play on the global stage, citing universities and education links as one of its priority areas. The 2016 FE strategy [Further Education Means Success](#) also highlights the role of international education both in terms of student mobility and commercial opportunities, although states that:

the international market for education and training is a challenging and complex one, which needs careful balancing of risk and opportunity alongside the core purpose of further education. As part of the implementation of this strategy, this area will be scoped and evaluated (p.68).

Since 2016 there has been limited literature for international policy development regarding TNE and the principle focus of international engagement policy is student mobility, for example through projects funded by the Turing Scheme and the Irish government.⁵

Home Office policy relating to UK immigration rules and regulations is also worth considering contextually. Although Home Office rules impact inbound student recruitment, they may also have an impact on the ability to develop partnerships and export opportunities and create a barrier in developing TNE in the TVET landscape. Anecdotally, colleges have relied on international student recruitment to form an income and staffing base, from which to explore and develop other forms of international activity such as TNE. Continued immigration policy change [is reported](#) as a challenge for both the FE and HE sectors in terms of both recruitment and other forms of global engagement across all four nations.

A further policy point relevant to this research is the fundamental shift in the way English FE colleges are classified. In 2022, FE colleges and their subsidiaries in England [were re-classified](#) as part of central government. As a result, they are now required to comply with the financial management framework

outlined in Managing Public Money (MPM). While some MPM financial operating requirements were already incorporated into college funding agreements for domestic provision, the broader application of MPM has introduced challenges for colleges and their subsidiaries – particularly in managing transnational income and expenditure, as any activity deemed to be ‘novel, contentious or repercussive’ needs to be approved by the Department for Education (DfE).

The impact of changing policy pertaining to post-16 education and skills in England more broadly is also relevant, put forward in the 2022 Skills and Post-16 Education Act which is underpinned by the 2021 [White Paper – Skills for Jobs: Lifelong Learning for Opportunity and Growth](#). Colleges have long-standing experience of skills and working with employers through vocational provision and apprenticeships. In England, the focus of colleges’ work was sharpened by the 2022 Skills Act, which places a statutory duty for college governing bodies to review and assess how effectively their provision meets local needs, known as the Local Needs Duty (LND). The LND requires English FE colleges to review their provision periodically and to produce annual Accountability Statements which became mandatory in 2023-24. The statements detail how colleges’ planned provision meets local needs, alignment with local skills improvement plans, and how well it supports regional and national skills priorities. As noted by Pretty (2026, [forthcoming]), these statements may lead to strategic tensions and challenges for colleges spanning multiple localities and with differing community needs and social value goals. However, they further highlight the strength of colleges’ responsiveness to policy and skills priorities, where these strengths may be advantageous in the development of TVET TNE work within the global marketplace.

⁵ [Minister Harris announces mobility funding for Northern Ireland higher education students](#)

Data and its challenges

In the UK, quantitative data on TNE activity in TVET within the FE sector remain limited, with most systematic data collection concentrated in the HE space. UK-wide statistics on students taught wholly overseas are collected only for HE providers through HESA's Aggregate Offshore Record. No equivalent record exists for the FE sector, meaning there is currently no centralised, routine dataset tracking enrolments, withdrawals or completions for transnational TVET programmes, in the same way that HESA does for HE. Available, national-level figures tend to come from occasional sector studies and surveys, or institutional disclosures. Sources can use different definitions of TNE and collect data inconsistently across providers and years, which can make comparisons difficult. In many cases, data on FE-based TNE TVET programmes are either combined with broader data or reported only at the institutional level, without disaggregation by programme, level, delivery model, or country. As a result, TNE activity in the FE sector remains under-documented and challenging to track consistently, leaving gaps in understanding of its scale, reach, and impact.

To help address these gaps, this study draws on a range of available sources that offer partial insight into the scale and value of TNE activity in TVET. These include the British Council and UK Skills Partnership 2022 [Value of UK Skills Sector Exports](#) report, which provides estimates of international activity across awarding organisations, colleges, and professional bodies, and the UK government's 2022 data on [education-related exports and transnational education activity](#), published in June 2025. Ofqual's annual qualifications market reports also provide some insight into the number of regulated qualifications awarded outside of the UK. In addition, the [Association of Colleges' annual international surveys](#) offer insight into UK colleges' international activity, including income, key activities, recruitment, and partnerships. Institutional-level data, specifically college accounts with reported income from international fees and overseas delivery, were reviewed, though the data has not been reported as these sources do not distinguish between higher and further education provision.

International revenue and exports

One of the few recent efforts to address this gap in TNE in TVET data is the UK Skills Partnership and British Council's [Value of UK Skills Sector Exports report](#) (2022), which estimates the scale and economic value of UK FE-based TNE. The report highlights the scale of activity across awarding organisations, colleges, and professional bodies, estimating that over 5.4 million regulated UK qualifications were awarded overseas in 2020/21, generating an estimated £1.65 billion. Unregulated⁶ training activity delivered overseas brought an estimated £536 million, of which £107 million was attributed to colleges. The proportion of college international turnover from unregulated qualifications slightly increased from 24% in 2018/2019 to 25.2% in 2020/2021.

In 2020/21, UK colleges generated approximately £130 million in international fee income, with student fees accounting for an average of 30.6% of their international turnover. This marked a significant decline from 2018/19, when colleges' international fee exports were valued at approximately £262 million and student fees represented an average of 39.8% of international turnover. Across awarding organisations, colleges, professional bodies and sector bodies, colleges experienced the largest reduction in international fee income during this period.



⁶

At the time of publication, the UK government are reviewing the IES and are due to publish an updated version later in 2025.

However, the findings are based on low survey response rates and limited available data, and the report itself notes that data quality remains a challenge. They also advise that 'extreme caution should be taken when interpreting any reported change in values between 2020/2021 and 2018/2019' (p.6-7). Despite these limitations, the report offers one of the few available benchmarks for the scale and economic value of UK FE-based TNE and highlights the need for more consistent and robust data collection across the sector.

More recent data provide further insight into the scale and development of international activity within the FE sector. [Government figures published in June 2025](#)⁷ show that between 2021 and 2022, total UK revenue from education-related exports and TNE rose by 9.5%, from £29.5 billion to £32.3 billion. Education-related exports grew by 7.7%, driven in part by growth in the FE sector. FE exports increased by £50 million (37.6%), rising from £140 million in 2021 to £190 million in 2022. However, this represents a significant long-term decline from 2010, when FE exports totalled £920 million. Overall TNE activity experienced even stronger growth, increasing by 30.3% over the same period; total TNE revenues rose by £0.69 billion, from £2.28 billion to £2.97 billion. In contrast to exports, TNE activity in the FE sector remained stable at £100 million in both 2021 and 2022.

Additional, institutional-level insights are offered through the AoC annual international survey, which gathers information on UK colleges' international income, activity and partnerships. Worthy of note is that the AoC survey is based entirely on voluntary responses. Of the 87 colleges that responded to the 2023/24 survey, 51% stated that they had carried out some form of international work, and 5% have stopped within the last five years; while this response rate is not high comparatively, AoC noted confidence that the key colleges engaged in international work were represented, providing credible insight into current activity. The average college international income (excluding overseas campus operations) was £805,000.⁸ Over half (51%) of colleges' main international activity, in terms of income, comes from recruiting international students (combining sponsored (28%) and short-term (23%) routes), with an average income from

such activity of just under £680,000 per college. Based on the survey data, the average funding colleges receive from outbound student mobility programmes – predominantly the Turing Scheme, as well as Taith (for Welsh colleges), Erasmus+ and DEHRIS (for Northern Irish colleges), and other locally funded projects – is £125,780.⁹

Data on international activity

[Ofqual's data](#) on the international market of regulated qualifications begins to highlight both the scale and the significance of UK TVET qualifications delivered by providers within the global education marketplace. Since 2019, Ofqual has published data on regulated qualifications awarded outside the UK. In 2023–24, more than 8.5 million certificates were issued to international learners, including over 264,000 (3%) TVET qualifications. These include over 220,000 vocationally-related, over 29,000 occupational, and over 12,500 other vocational qualifications. Though, the data does not provide the same level of granularity as for UK delivery of qualifications, for example on specific subject areas. Further, these figures only capture regulated qualifications leaving no systematic data on unregulated qualifications.

The AoC international surveys also offer a broader picture of how and why FE colleges are engaging internationally, relevant to this research as activities such as student mobility projects or sponsored student recruitment, which open up international opportunities for providers, including the development of TNE provision. The number of colleges reporting international activity has remained relatively stable in recent years, with 44 colleges (of the 87 survey responses) reporting international work in 2023/24, 38 (out of 40 college responses) in 2022/23, and 54 (out of 82) in 2021/22. Motivations for international engagement continue to be mixed but largely commercial. In 2023/24, 75% of colleges cited income generation as a key driver, up from 66% in the previous year. Cultural diversification (68%, down from 76%) and student mobility opportunities (66%, down from 89%) were also important but slightly declining priorities. Around two thirds (64%) reported that international work formed part of their college's strategy, a slight drop from 74% the previous year.

⁷

In this data, TNE refers to UK education delivered to students based outside the UK, including tuition fees received by UK providers from students enrolled at overseas campuses. A methodological change introduced in 2022 revised how revenue from UK-controlled foreign affiliates is counted; rather than estimating repatriated profits (previously assumed to be 10% of sales), the full value of overseas education sales is now treated as export income, in line with international guidance. TNE forms one component of education-related exports, which also include tuition and living costs of international students in the UK, online learning, edtech, publishing, and related services. More detail can be found [here](#).

⁸

Based on 44 responses.

⁹

Note the difference in provider and student mobility, as outlined on [page 10](#).



International engagement in colleges takes multiple forms, with over three quarters (77%) engaged in the Turing Scheme or other mobility funding in 2023/24. A significant proportion (74%) recruited students through short-term or visitor routes, though volumes remained modest; 58% recruited fewer than 50 students, while just 25% recruited more than 100. Recruitment via the student sponsor route was reported by 63% of colleges, though a third (33%) identified sponsor licence regulations as a barrier to recruiting internationally. This aligns with aspects of wider national trends; in the year ending March 2025, the UK issued 403,497 sponsored study visas a 10% decrease from the previous year, with most visas granted at postgraduate level. The number of dependant visas fell sharply by 83% following January 2024 policy changes restricting eligibility, echoing concerns from one-third of

colleges about regulatory barriers. Although the dependent visa restrictions have impacted postgraduate recruitment most significantly, the tightening of controls on UK visa policy can feed into the wider narrative around migration and may damage perceptions and intent around the UK as an attractive study destination.

Other international activity includes professional, vocational, or bespoke training programmes for international partners (51%), summer and winter schools (35%), projects funded by UK or international governments and agencies (e.g. Prosperity, British Council projects) (30%), online courses (26%), and consultancy or accreditation work overseas (19%). Only 7% of colleges reported overseas campus operations, with 2% reporting this as their main international activity.

Research questions

While the broad scope of international work by UK colleges is sought by the AoC's annual international survey, a link to TNE is not explicitly established and data is scarce. This research aimed to close this gap and identify and explore characteristics, outcomes and challenges of TNE in the TVET sector in the UK. As well as establishing what the current picture is of activity, the research also considers the opportunities and future trends of TNE in TVET and provides recommendations for policy makers and providers.

Specifically, the following questions were explored:

- What are the characteristics of (former and current) TNE models in TVET in the UK?
- What can be learned from international practice?
- How is TNE perceived and experienced by providers and policy makers, in terms of success factors, challenges, and impact of TNE in TVET?
- What are the possible future trends in TNE given current global and local political, social, and environmental contexts?
- What are the policy and operational recommendations for implementing effective TNE models in TVET, particularly in low-and middle-income countries?



Methodology

To address these aims, a mixed method approach was used for the research. Firstly, a scan of the sector was carried out to understand the models of TNE that exist in the UK; this has drawn on sources of evidence including college/independent training provider (ITP) websites, existing contacts, AoC's international survey, grey literature, academic literature and snowballing to identify experts and practitioners through the research team's existing networks. Following the mapping exercise, semi-structured interviews were conducted with UK colleges, awarding organisations, policy experts, and specialists from different international contexts. Interviewees were approached through existing contacts from the research partners and through cold approaches from the literature review and the mapping of the sector. A total of 18 interviews were carried out between April and July 2025. Table 2 shows the spread of interviewees. All interview data were thematically analysed (Braun & Clarke, 2006) using NVivo to code and analyse the transcripts. The UK providers were all from colleges, rather than any other independent training providers, and therefore the findings represent most closely this type of provider.

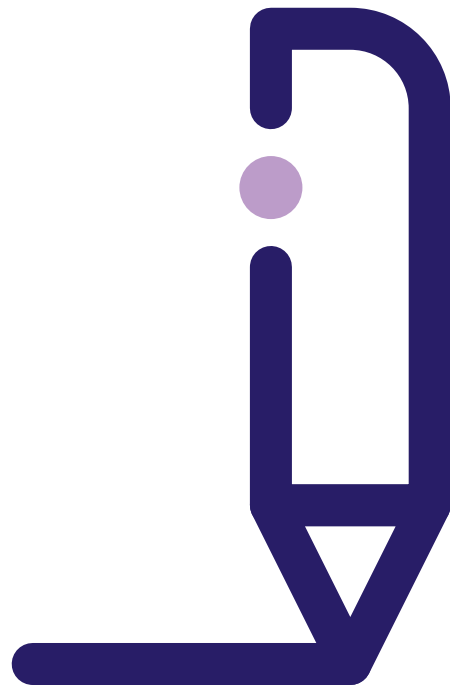


Table 2: Interviews conducted

Type of interview	No. of interviewees
English provider	5
Scottish provider	2
Welsh provider	1
Northern Ireland provider	1
UK skills and policy representatives	3
Awarding organisations	2
Host country (African country)	1
Australian expert	1
Canadian expert	1
International TVET transfer researcher	1
Total interviews	18

As discussed above, there are challenges in obtaining systematic data on TNE in the TVET sector, therefore the research sought to complement the qualitative interviews with institutional-level data – such as college accounts and reported income from international fees and overseas delivery. A pre-interview questionnaire (PIQ) of TNE activity in TVET was therefore developed, which attempted to build a fuller picture alongside the available national data sources. The PIQ aimed to collate data on the programme specifications and the student numbers, including enrolment and completion, and was sent out to providers once the interview had been scheduled. A number of attempts were made to follow up providers to gain this information, however only one return with complete information was received, therefore results are not used from the PIQ. This does suggest that providers may not have this data systematically collated and accessible, potentially because data collection on TNE activity is not taking place consistently.

A further limitation of this research is the low representation of stakeholders representing host countries. Efforts were made to connect with representatives from host countries through UK TNE providers and through existing contacts, though only one host country stakeholder was recruited. The interviewee was based in an African country and had oversight of TNE in their country and partnerships that had taken place with the UK and other provider countries. Furthermore, an interview was carried out with a researcher who has been engaged in researching perspectives of African countries involved in skills and TVET transfer models.

This research follows the British Education Research Association (BERA) ethical guidelines 2024, concerning issues such as informed consent, anonymity of interviewees, confidentiality of research data, and data protection (BERA, 2024). Participants were informed that both colleges and their names will remain anonymous throughout this report, unless they have otherwise given specific consent for information to be shared.



Findings

The Findings section of this report begins with a description of the different types of TNE in TVET activity and the characteristics witnessed throughout the research. The section then goes on to describe the outcomes of TNE in TVET, the challenges and a look to the future at the opportunities that can be seized upon for the sector. Extracts are used from the interviews throughout to help illustrate the analysis. Quotes from interviews have been anonymised.

TNE in TVET models and characteristics

This section provides an overview of the models that have been discovered through the key informant interviews and scan of the UK FE sector. It explores the definitions of TNE and offers some categorisations of these various activities. Three vignettes, which showcase a range of TNE activities and UK nations, are also presented to explore some programmes in detail.

Definitions of TNE in TVET

The interviews with education professionals and experts, interrogated their understanding and interpretation of TNE within the context of TVET. The interviews revealed diverse perspectives on TNE definitions, delivery models and scope of activities. The majority of interviewees conceptualised TNE as fundamentally involving the transfer of education across national boundaries. This understanding was predominantly framed around the export of domestic educational capabilities, with participants emphasising the process of ‘taking our skills and competencies and pedagogies and what we’re good at abroad’ (College 5), to serve learners located in countries different from where the awarding institution is based.

While many participants initially described TNE as a unidirectional transfer process, some recognised the concept as encompassing bidirectional learning exchanges. These respondents acknowledged that effective TNE involves, not only the export of educational programmes or delivery, but also the import of knowledge and practices from partner countries, creating more collaborative and mutually beneficial educational relationships.

A Canadian expert who was interviewed stressed that for them TNE also stretches to encompass international development activity, where they have become particularly active in their delivery. Another also highlighted TNE as including the partnerships initiated by the British Council. However, this inclusive definition was not universally accepted. Some participants argued for a more restrictive definition, maintaining that TNE should be considered distinct from broader international education activities and does not encompass grant-funded project work. The Canadian expert goes on to argue that due to their conceptualisation of TNE as a broad term, that includes virtual delivery, international capacity development and even research, that they preferred to compartmentalise the work they do in this space as ‘international programme and provider mobility’, meaning programmes and providers delivering offshore.

Despite many participants initially focusing on TVET taking place overseas, in a country distinct from the awarding/delivery provider, several acknowledged that TNE definitions should encompass student mobility into the UK. As one stakeholder explained:

It’s the opportunity for students to learn and be educated in [the] UK system education. Now, whether that’s where they have an opportunity for an exchange where they come into country, or whether it’s an opportunity for them to learn in their college that has a relationship with a British college or a UK college that can provide some of that education (Skills 1).

Indeed, when participants discussed and described TNE they delivered, they often conflated examples with elements of student inward-mobility, which they discussed as forming part of their TNE delivery. As an interviewee from a host country explained TVET’s distinctness from TNE in other sectors is defined more broadly as partnerships with other international actors, ‘be it government, be it NGOs, or be it international private sector’ (Host 1), and therefore could include elements of student or tutor mobility.

Interviewees gave a range of examples when defining TNE. These included branch campuses, joint partnerships, colleges doing exchanges with each other, teacher exchanges, or UK teachers going to an international college. Participants also explained that TNE may encompass both in person and online

delivery as well as blended delivery. One noted that TNE activity in relation to FE does not necessarily need to be attached to an accredited award (as may be the case in HE) and may be less formal delivery which could for instance include a certificate of attendance. Although, one participant surmised that it includes 'teaching predominantly students on a set course' (College 6).

The findings display that there is no consistent definition amongst stakeholders in the FE space, with contentions between the broadness and narrowness of what TNE delivery can encompass. This is reflective of the diverse set of research participants and range of activity taking place which ultimately can impact their definition of TVET TNE as they describe it from their own perspectives. This suggests a need for greater clarity and consensus around TNE definitions within the TVET sector.

Models of TNE

The TNE landscape in TVET is characterised by diverse models and activities that reflect the practical, hands-on nature of technical education.

Most models emphasise tailoring of content and delivery to specific market needs and partnership capabilities. Based on this research, Table 3 below shows these different elements of implementation, funding, delivery, and partnership of TNE in TVET, which illustrates the complex landscape of TNE in the sector. It is worth noting that some examples given by participants cut across different models, modes and methods. An attempt was made to draw on Knight's classification of TNE (2017) to act as a comparison point for this research, however, TVET offers varied and flexible TNE delivery, which highlights the unique contribution of the sector, but which makes it challenging to fit neatly into existing models of TNE. For example, the target audience might include non-employed students, those who are employed or the teachers/trainers as students themselves. Furthermore, the duration of programmes may vary, depending on the host country, employer or individual need. Some of the similarities and differences will be highlighted whilst recognising that TVET makes a unique contribution to the TNE space.



Table 3: Elements of TNE in TVET

Model <i>A framework for how a TVET programme is organised or partnered across institutions and borders</i>
Employer partner (industry training/upskilling need)
Government partner (e.g. support systems reform)
Combination of employer/host government partner
Progression model (e.g. UK inbound mobility for 1+1, 1+2 or continuation of training)
Tri-country partnership
Awarding organisation centre and scheme approval only
Mode <i>The setting and format (may be full- or part-time) in which a programme of study is delivered</i>
Face to face at campus/premises in host country
Face to face at campus in provider country
Online with teacher input
Online/remote self-directed study
Hybrid – mix of above
Method <i>Teaching and assessment practices (may be accredited or non-accredited provision)</i>
Flying faculty teaching and assessment
Provider employs local staff for teaching and assessment
Joint host and provider partner teaching and assessment
Funding Mechanism <i>The structure and origin of funding as an enabler of TVET TNE</i>
Host country government
Host country employer
Self-funded (by host country student/parent)
Co-funded

As can be seen from comparing Table 1 (p.11) to the above Table 3, TVET TNE has some similarities but many differences to HEIs' delivery of TNE. Although Knight's (2017) TNE classification framework presented on page 11 is recognised as a common framework for TNE, this research uncovers additional features that TVET offers in the TNE space. We do witness both independent and collaborative approaches to TVET TNE as described by Knight (2015, see page 10 of this report). Whereby UK TVET

providers are independently (of the host country) primarily responsible for the design, delivery, and external quality assurance of their programmes and qualifications being offered in another country. The research also uncovered examples of programmes that took a collaborative approach where the sending provider and host country (whether governmental, provider, or employer) have worked together on the design, delivery, and/or external quality assurance of the programmes. It is also worth noting that most UK

FE providers usually do not have their own awarding powers, therefore they may work with multiple UK partners (such as an awarding organisation) to give centre and scheme approval for it to be delivered and accredited in the host country. Alternatively, a UK provider might be delivering industry training that is non-accredited.

Table 4 illustrates some of the key examples of TNE in TVET observed in the research. The examples of Table 4 show that different elements of Table 3 are drawn upon in varying ways demonstrating the complex and diverse nature of TVET TNE offerings.



Table 4: Illustrative descriptions and examples of TNE in TVET activity

1 TNE activity	2 Description	3 Key features	4 Examples
Franchise model	Sponsored by a local institution or government who delivers programmes, that are awarded/ accredited by the UK provider or awarding body	• Franchise arrangements between UK college or awarding body and with host partners • Licensing agreements with UK branding and materials used • Educational institutions will go through rigorous quality assurance as an approved centre and to deliver qualifications • Standardised certifications (usually internationally recognised) • Ongoing quality assurance processes	• A UK college's higher national diploma in hospitality franchised out to a partner institution in India – the UK college provide all the materials, all the quality assurance, and capacity training and the partner institutions' lecturers deliver the programme. • A UK college deliver the quality assurance and training for UK branded courses in auto engineering delivered in Chinese colleges. • A UK awarding organisation (AO) working with MQA (Malaysian Qualification Authority) to give equivalence to 10 of their advanced diplomas.
1+1 model (or 1+2 etc)	Students study one or two year(s) in home country, and one year in provider country		• A UK college offer marine and nautical programmes, predominately to students from India/Pakistan studying one year in their home country at a partner institution then come to the UK to study for year 2.

Table 4 Continued

1 TNE activity	2 Description	3 Key features	4 Examples
Branch (satellite) campus model	Physical establishment of educational facilities in the host country	- Bricks and mortar presence - Complete infrastructure in host country - Direct operation by provider institution - May begin with UK staff training host country staff to teach and sustain model - Most expensive and high-risk model - Not commonly seen yet in the UK's FE sector	Niagara College (Canada) campus in Saudi Arabia. - Not yet seen in the UK college sector. - At least one UK college looking at the feasibility of a branch campus in the coming years.
Bespoke programmes or joint programmes (Programmes may be directly funded and designed for specific employers, host country government and/or host country institutions)	Programmes taking place in the host country	- Often involves UK staff/institution representatives going to host country - Host country/institution may become licensed to deliver UK qualification or may be certified by UK awarding body - May be job specific training - May be co-funded by students/parents	- A UK college delivering elements of vocational courses in Chinese colleges e.g. quantity surveying modules in construction management. - UK colleges working with partners in Saudi Arabia (Colleges of Excellence) to deliver tailor made TVET programmes. - A UK college working with Saudi's largest employer to train their oil and gas inspectors in-company.
	Short programmes delivered in provider (UK) colleges / summer school model – inbound students	- Short duration - Cultural exchange element - Taster programmes – leading to further international student recruitment - Can easily use UK staff and high quality, appropriate facilities and equipment - May be job specific training - May be co-funded by students/parents	- UK college summer schools: English language alongside taster vocational courses taking place at UK college campus. - Mauritius trainers visiting a UK college for an intensive week of training on electric vehicle (EV) installation and environmental awareness training as a micro credential.
	Hybrid/blended model (Combination of online and face-to-face delivery)	- Asynchronous and synchronous content, including online lectures. - In-person delivery intensive, classroom based, delivery and in-country - Practical learning can be done in person	- A UK college teaching the 'English for business' element within an undergraduate business degree at a Chinese university, involving 8 weeks online and 8 weeks in-country, twice yearly. - A UK college delivering maritime programmes for learners in Indonesia, involving face to face delivery in Indonesia and follow-up online sessions to keep costs for the government low. - Some colleges offered Covid-adapted programmes (temporarily).

Table 4 Continued

1 TNE activity	2 Description	3 Key features	4 Examples
Advisory role – e.g. curriculum development	Creating and/or adapting bespoke programmes for specific markets or employers	- Provider is not usually involved in delivery - Customised content/market-specific - May be accredited by host country qualification body ‘Endorsed’ by UK institution	- A UK college working with Chinese institutions to help internationalise their curriculum (no accreditation involved). - A UK college developing a bespoke construction curriculum for a diploma in South America.
Online/virtual self-study model	Full programme delivery through digital platforms. Foreign sending, distance education provider offers programmes directly to host country students. No local institutional support available.	- No physical mobility required - Scalable delivery - Technology-dependent - Not always viable or preferred for TVET	- A UK college delivering Chartered Management Institute qualification online (across any country). - A UK college leading on bite-sized sustainable energy skills development for the construction sector through an innovative digital platform (ARISE).





A franchise set-up was observed frequently in this research, across both FE colleges but also the most common approach used by awarding organisations (AOs) accrediting TVET. This is when a programme is awarded or accredited by a UK provider or awarding body, and sponsored by a host institution or government overseas, who usually delivers the programmes.

There does appear to be an additional layer across TVET which are the bespoke/joint programmes, which tend to be short-term programmes, or elements of existing programmes, that respond to a specific skills need within a particular country or context. This shows the unique nature of TNE in TVET which has more agility and responsiveness compared to what is seen in HE.

The one plus one (or 1 + 2 etc.) model is not discussed in the Knight (2017) framework and this may be due to it being regarded as student mobility in the HE sector, where international students would spend their first year of study in their home country and then travel to a UK institution to complete a second and sometimes third year of study. It is included here as it was discussed in the interviews as a distinct type of partnership between a UK college and overseas institutions. Again, a difference we found in TVET is that sometimes TNE does involve inbound learners studying in the UK, for example a group of Mauritian trainers visiting a UK college for micro credential training on EV installation and

environmental awareness training for a short bespoke course. This isn't the usual international student mobility opportunity, which is widely seen across HE, but training that has been developed in partnership with stakeholders in Mauritius to provide capacity building for trainers from their country. These are often shorter programmes which may take place over only a few weeks or months. This reflects the discussion with participants above in the definitions of TNE in TVET, participants described TNE which involves learning taking place at a UK campus.

The branch (or satellite campus) was not witnessed in TVET in the UK in the same regard as discussed in Knight's framework. However, a key informant from a Canadian TVET provider did discuss that this model does exist for them, with one of their colleges having a branch campus in Saudi Arabia. A key issue here is that UK colleges may not be permitted to do this because their funding is public money and they cannot borrow.

Overall, Tables 3 and 4 show both the complexity and flexibility of TVET. TVET often includes short bespoke courses between multiple types of partners (e.g. government, employer, awarding organisation, and provider(s)) and through different delivery methods. The examples we witness in TVET are made up of multiple elements which vary in different formations depending on the provider, the host country and the type of partnership.

A partnership approach that was discussed by participants as a potential area for development was a ‘third country scenario’. This consists of a three-way partnership drawing on UK TVET expertise, with investment from a second country, whilst making use of the physical space located in a third country. The example was given that China is willing to invest in their capacity building and wish to draw on the expertise of UK college partners, and India has an empty building which would work for the delivery. It was therefore envisioned that the three partners could come together in a mutually beneficial partnership. The research didn’t uncover an example of this in practice yet, but participants discussed this as a potential future scenario.

Subject areas

A range of course areas were mentioned in the research which were common fields of operation for TNE activity. Commonly hospitality, such as catering, and health and social care were popular. Technical fields in engineering, aviation, maritime, and construction were also highlighted, where the UK has specific expertise that it can share internationally. Another area was around education and teacher training. There was some discussion around the applicability of some disciplines over others for TNE delivery. For example, one expert explains the relative universal applicability of hospitality compared to a field such as electrical:

I think there was probably a little bit more success in hospitality. Because the thing about hospitality is that you really train people for a fairly universal standard, like, if you’re working at the Hyatt or the Ibis or, you know, there’s just a universal standard [...] Another example is trying to teach electricians in China when clearly the electrical system is different here or in Western places, so there’s more barriers (Australian expert).

An area that was noted by a number of participants for its growing importance and future potential for growth was around green skills, whether that be whole programmes focussed on environmental technologies and practices, or ensuring elements of green skills and training are incorporated into other programmes. It was emphasised that the UK has expertise to offer skills development in this area.

A host country expert discussed how they look to countries who are known to offer expertise in particular industries, for example auto industries from China or renewable industries from Scandinavian countries. They explained that with ageing populations and the rise of AI, people and care-centred jobs should be a future focus for TNE and that they would look to European partners, such as the UK, who could offer high quality experience to support their TVET sector. The sports industry was also highlighted as a subject area of focus that is growing in prominence and regarded as a sector that can help generate wealth, and which the UK has established excellence in.

Notably, some colleges are also delivering A Levels as TNE, which although are not vocational, do form a part of their UK FE provision.

Host countries

The most frequently mentioned host countries that interviewees mentioned working with or where TNE in TVET activity exists were China, Saudi Arabia, Pakistan, and India. Other frequent mentions were other countries in East and Southeast Asia, and the Middle East. Interviews suggested that some countries such as Qatar, UAE, and Jordan have been strategically targeted as countries perceived to have the government drive and the required resources to invest in internationalising their education systems, including through TNE models. Several references also indicate targeting of emerging economies and developing countries, such as of those in Africa and South America. In some cases, the national governments of these countries are initiating and funding the TNE provision. This will be explored further in the ‘Who is funding TNE?’ section on [page 33](#).



There is also evidence that not only can low- and middle-income countries be host countries of TNE from countries such as the UK, but they are also developing the expertise in TVET to become provider countries themselves. For instance, Host 1 discussed partnerships with Europe including the UK to develop their TVET delivery, but likewise they are using the expertise they have established to create partnerships with countries in sub-Saharan Africa to also support the development of their TVET.

Teaching staff

The delivery of TNE programmes requires staffing arrangements that balance quality assurance with operational efficiency. The analysis reveals a range of staffing arrangements from setting up a dedicated international team in the FE college to flying faculty arrangements, where UK staff spend short, intense periods of time teaching overseas, each presenting distinct consequences and resource implications.

The flying faculty model represents a flexible approach to international delivery, with staff traveling from the UK for specific periods of time to deliver TNE programmes abroad. Some colleges employ this model for their China operations, where staff are employed by the UK provider and travel to deliver specific programmes. This model offers greater flexibility than permanent overseas deployment but presents challenges in terms of travel costs, staff availability, and continuity of the UK college delivery. The typical deployment pattern

may involve short-term visits of two to three weeks, several times a year, which some institutions discussed as being outside the scope of ordinary employment contracts.

For large-scale operations, some institutions have established overseas legal entities. One college operates a Saudi-registered company employing international staff on commercial terms. The use of native English speakers was emphasised as key to staff recruitment, where teaching staff are drawn from multiple native English-speaking countries including the UK, Ireland, South Africa, Canada, and Australia. Another college has established new lecturer job roles based within the central business and international team of the college, rather than relying on their existing teaching staff. This arrangement addresses the challenge of faculty availability and costs of backfilling staff, though it requires careful recruitment of staff willing to undertake international travel as part of their role.

Many institutions combine UK staff deployment with local partner involvement in the delivery of TVET programmes. Colleges provide training to local lecturers based in the host countries, who then deliver programmes using adapted UK methodologies. This approach recognises the importance of local context and the value of local expertise while maintaining UK quality standards. Similarly, train-the-trainer programmes represent another hybrid approach, with partner institutions sending staff to the UK for intensive training periods. Although, face-to-face training is largely preferred,



the integration of online delivery has emerged as a response to both cost pressures and challenges such as the Covid-19 pandemic. One college described how they developed blended approaches that combine preparatory online work, face-to-face intensive delivery, and follow-up online sessions.

Several institutions have established dedicated international teams to support TNE delivery and international partnerships. One Scottish college exemplifies this approach with a 10-person international team structured across three functional areas: business development, international admissions and compliance, and international projects and student support. This set-up provides dedicated resources to TNE but requires significant institutional investment and commitment. Dedicated staff are focussed on business growth and actively seek out opportunities for TNE in prospective markets overseas. However more widely across the UK such dedicated teams are not commonplace, as one skills expert described:

most of the people I deal with in colleges doing international it's not their job. [...] and most colleges do not have an international person anymore (Policy 1).

For some colleges, it may be the case that they have a member of staff that covers the international portfolio of work, but that international element is just one element of a wider remit of their job role, which may cover other areas such as student recruitment. The evidence shows that for those institutions with such dedicated international teams, have also an extensive profile of TNE programmes.



Who is funding TNE?

Funding for TNE programmes draws from multiple sources across public and private sectors. Overseas governments represent one of the most significant funding sources for TNE programmes in TVET. Countries like China, Indonesia, Brazil, and Saudi Arabia have invested in supporting cross-border educational partnerships.

UK government support, while present, remains limited in scope. The Scottish Education Exchange Programme (SEEP) provided around £500,000 annually through grants of up to £25,000 for universities and colleges to develop international partnerships. Yet this funding covers both further and higher education. In addition to the lack of policy developments supporting TNE (see UK policy context, [page 16](#)), multiple interviewees noted that UK government funding is insufficient to meet demand, forcing institutions to seek alternative funding sources. Such UK government funding could be significant for colleges in helping support start-up costs of TNE operations.

Private funding takes various forms, from direct student payments to employer sponsorship. Many programmes rely on a mixed funding model where some students are self-funded while others receive support from their employers or educational institutions. In TNE programmes discussed in the interviews that are delivered in Beijing, for instance, parents fund the programmes directly while the municipal education department provides capital investment for facilities. In Libya, the national oil company supports training programmes for thousands of their employees.

International development organisations, including development banks, non-governmental organisations (NGOs) and trade associations, provide another important funding stream. These sources typically focus on middle and lower-income countries where financial support is most needed. However, this funding often comes with significant challenges around sustainability, as programmes may struggle to continue once initial funding periods end. Some further issues around funding are discussed in the 'Challenges' section on [page 42](#).

City of Glasgow College (CoGC) has built a strong reputation internationally over many years through its overseas partnerships, particularly in TVET fields such as hospitality, supply chain management, nautical studies, and marine engineering. A notable example of this success is the college's thriving **franchise model**, including the delivery of its Advanced Diploma in Hospitality Management through a partner institution in India. Under this model, CoGC supplies the full suite of learning materials, quality assurance processes and capacity-building support. While the teaching staff are based in India, they are trained by CoGC staff and must meet the college's high academic and professional standards - ensuring students receive an experience comparable to that of learners in Glasgow.

Although academic standards remain consistent, elements of the curriculum are adapted to reflect the local context. For example, in countries where meat consumption is limited or culturally restricted, the hospitality and catering content is tailored accordingly, for instance by using local ingredients. In addition to curricular adjustments, CoGC also supports changes in pedagogical approaches as part of its capacity-building efforts. Rather than relying solely on didactic teaching, partners are encouraged to adopt more interactive methods - such as group work and practical, skills-based learning - requiring both pedagogical and material adaptation.

As Carla Gethin, Vice Principal Corporate Development and Innovation explains:

‘Our partnerships are strong because they are built on genuine collaboration. It’s never simply a matter of handing over a qualification to be delivered elsewhere. We work closely with each partner to ensure the programme is fully contextualised to their specific needs. We also maintain flexibility in delivery methods to ensure the approach is both culturally appropriate and pedagogically effective.’

These partnerships also bring tangible benefits to Scottish students based in Glasgow. Joint initiatives between students in India and Scotland - such as collaborative projects and culinary competitions hosted either at CoGC or the partner institution - enhance the learning experience. These exchanges not only motivate learners but also enrich their CVs and help foster an international mindset, boosting their future career prospects.



Cardiff and Vale College (CAVC) have developed well-established partnerships with a range of providers to support their delivery of TVET provision. One initiative is the British Teaching Diploma (BTD). This Level 7 certificated professional development programme for teachers and educators based in overseas settings allows participants **to apply the best of British and global pedagogy in their day-to-day practice**. The BTD has made great inroads into the Middle East, via Jordan, and its success has supported expansion into other target markets where a UK award is held in high esteem, such as Latin America, India, and other parts of Europe. A current initiative is the development of a BTD version specifically designed for TVET practitioners which they hope to roll out to the market with their partner UK awarding body later in 2025.

Alun Rees, Director of International at CAVC describes:

‘We’ve had some fantastic testimonials back from teachers in Jordan and the Middle East about how it’s fundamentally changed their practice in the classroom, because they haven’t previously been exposed to some of these techniques and strategies that we’re delivering. Some of the stuff is maybe quite cutting edge that they may not have picked up when they did their teacher training. For some countries, the teacher training systems are very different from the UK. Access to CPD is often inadequate in many countries, so the fact that we’re exploring these kinds of tools and strategies that they can use with their pupils and students in the classroom, they really do get significant benefit. They become better teachers, but ultimately, it’s their learners that really benefit from the BTD in the form of enhanced learning and improved outcomes’.

British Council’s international skills partnership grants have also helped initiate successful partnerships. For

example, between CAVC and partners in Mauritius, to provide **skills and curriculum development training in green technology**. The initiative was organised into two complementary strands: Firstly skills training (‘train the trainer’), involving trainers representing three different training organisations from Mauritius visiting Cardiff for one week to complete micro-credential courses in Electric Vehicle Charging, Electrical Energy Storage, and Environmental Awareness. Participants successfully passed their courses and received official certification. By certifying Mauritian trainers in the UK, the project has created a sustainable pathway to deliver green technology education locally, through the trainers offering short courses on the island in collaboration with the Mauritius Qualifications Authority. This ‘cascading’ approach is more effective than one-off training sessions because it helps to build sustainable capacity and capability within the Mauritian TVET system.

‘So, they’ll take that knowledge and transfer those skills back to Mauritius....they go back. They will have an accredited qualification, a micro credential, which they will aim to get recognised by their national qualification authority. They can then go out into the field and cascade that training’

(Alun Rees, Director of International, CAVC).

The second element is around **curriculum development**. The work looks at developing short vocational programmes or **micro-credentials** at Levels 2 and 3 which can feed into a wider green technology curriculum framework for Mauritius. Existing programmes delivered in the UK were identified and adapted to meet the particular needs of Mauritius. This process helps to introduce more structured, credit-bearing programmes that could be officially recognised by the Mauritius Qualifications Authority.

CAVC’s expertise in green technology and international delivery has allowed them to develop similar projects in other countries who are seeking expertise to advance their transition to net zero, such as Botswana. Indeed, engineers from the Botswana Power Company (BPC) have recently attended CAVC undertaking a week’s training in the installation of small scale solar photovoltaic systems. It is hoped that CAVC can formalise a partnership with BPC to continue this important work in the net zero domain.

Since 2012, the **Lincoln College Group (LCG)** has developed an ambitious and commercially successful TVET TNE portfolio, initially collaborating with partners in China and expanding to Saudi Arabia under the Colleges of Excellence programme. By 2019, this international engagement alone taught over 4,000 students annually, with revenues generated allowing them to reinvest in their UK-based further education provision.

‘Over the years our international work has allowed us to reinvest significantly into cutting edge resources for our UK-based further education provision, including the Lincoln Air and Defence College.’

(James Foster, Managing Director of International and Commercial, and LCG Deputy CEO).

The Group adopts both a **flying faculty model**, and **employs staff globally**, including native English speakers in host countries. Through their subsidiary in Saudi Arabia and partnerships with four state colleges in China, they have now trained over 12,000 TVET students, covering sectors such as engineering, hospitality, tourism, business and accounting, and oil and gas.

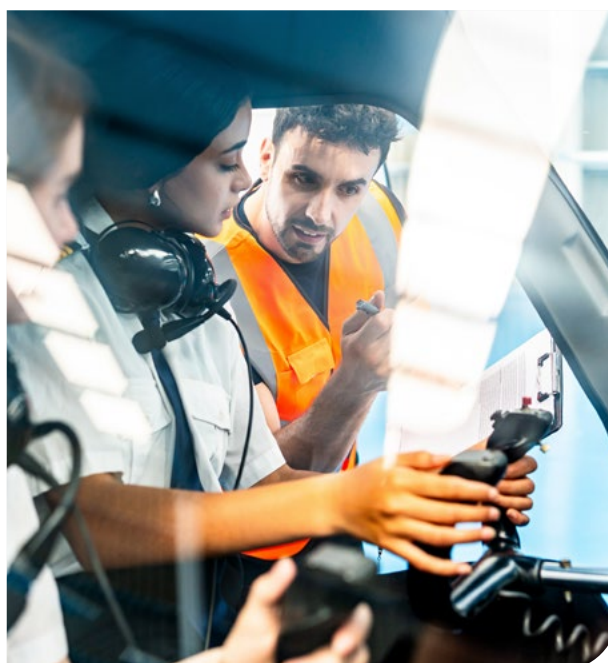
The Group’s notable technical and vocational education involves **customising provision for specific employers** like Saudi Aramco, working collaboratively with this anchor employer to develop skills for oil and gas inspection. The model is co-funded by the employer and the Saudi government; the Group’s Deputy CEO compares this to an apprenticeship model, enabling student progression to local employment opportunities or within their careers.

Working with the Saudi government to support their strategic goals of skills development and talent retention, other initiatives have been targeted at gender and inclusion. The college operated the Qatief Female College from 2014 to 2023 and during this time, trained up to 2,000 young Saudi female students per annum. The college was at the forefront of cultural change across the Kingdom, in line with the Saudi 2030 Vision to reduce unemployment and raise female aspirations and opportunities. Their success at Qatief was underpinned by recruiting and developing highly qualified, experienced teachers with industry backgrounds. This spans all core curriculum areas from the Preliminary English Test to Foundation, Associate Diploma, and Diploma levels.

The College has strong community links and reputation as a direct result of respect and cultural awareness during its operation. This is also endorsed and supported through employer links enriching the curriculum, resulting in 100% student engagement in on-the-job training. This partnership has brought a new type of female employee to the Kingdom, to support the Saudi government’s initiative to increase the ‘Saudisation’ of the workforce and the female participation percentage. Examples include training female forklift drivers, a concept that would have been unthinkable a few years ago.

The groups TVET TNE delivery is far reaching and includes **bespoke international programmes**, such as work in the Eastern Caribbean, Romania and British Council-funded projects in Uzbekistan and Morocco. Additionally, because the group values meaningful opportunities for staff and students to experience global and cultural engagement, they also host a small number of international students in the UK, such as A Level students annually from Norway and, more recently, from Switzerland and Nigeria.

The Group’s contribution to international education was recently recognised by the Department for Business and Trade through the **‘Made in the UK, Sold to the World’** awards. By prioritising strategic partnerships, diversification, and long-term sustainability in the TNE marketplace, the Lincoln College Group continues to position itself as a leading UK provider in international technical and vocational education.



Setting up of TNE provision: why and how

UK providers' reasons for setting up TNE provision

Some of the colleges interviewed referenced historical involvement of their college with TNE as a reason for currently having TNE activity, with some noting programmes and partnerships stemming back years, if not decades. The primary driver however appears to be income diversification, with institutions seeking to expand their revenue streams beyond the shortfall in government funding. One college explicitly mentioned looking to 'diversify our income streams' (College 8) as a key motivator for international expansion. This in turn can be fed back to home students in order to invest in industry-standard facilities and student opportunities. It is difficult to rely on income from international student recruitment alone in the FE sector, which universities are better set up to benefit from and have a competitive advantage over colleges. As one college explained:

[universities have] tremendous recruitment machinery, very, very efficient, very, very effective, much more than you know, we [colleges] would never hope to be able to compete with that kind of recruitment infrastructure that universities have got (College 1).

They went on to compare the perception that a full university campus experience offers more than an FE experience offered by a college as a reason for universities having this competitive advantage for attracting international students.

Some colleges noted that although income generation was an initial motivator, there are more significant benefits to TNE:

there have been pressures on budgets in those countries and some years we have broken even with our international income. But we've continued to do it for those wider and softer benefits (College 5).

Such wider benefits may include TNE partnerships where there are opportunities for mutual learning and organisational development. College 8 sought 'added value benefits to our organisation through what could be learnt in terms of collaboration and working with international partners'. There were prospects of joint research opportunities, staff exchanges, and collaborative learning between institutions that would enhance both parties' capabilities. Institutions viewed TNE as a way to provide enhanced opportunities for their domestic students, including supporting colleges to internationalise their curriculum and offer students exposure to different cultural contexts, broadening their educational experience beyond what many had previously been exposed to.

For the Canadian expert their international activity was very much focussed on capacity building in line with international development objectives. More broadly UK colleges also highlighted the opportunities for capacity building in TVET, with some mentioning an identified skills need in particular country contexts, which could not be filled by universities. One interviewee explained the unique contribution colleges can make in this space:

So skills can mean lots of things, of course, at all levels. But nowadays, you know, the grey zone between colleges and universities is kind of smudged, even more translucent, and it's all about pathways. People need pathways and they need to be able to get on and off those pathways at any point with any capability. And the great thing about colleges, they are really good at dealing with the really difficult kind of starter end, as well as, you know, drop outs from society, reengagement, all of that, and all done with industry's blessing, right? So they work really closely and superbly with industry (Policy 1).

Colleges discussed these opportunities to improve the infrastructure and skills of a country as a key motivator.

On an institutional level, UK colleges also discussed the opportunity TNE afforded them to build a strong reputation for excellence and feeding into the 'brand reputation' of not only the college, but also the city and the country.

The research also uncovered some perspectives from host countries and why they choose to set up TNE. One interviewee explained that they are not looking to reinvent the wheel, rather they wish to draw on the expertise from elsewhere:

To capitalise on experiences that have been successful in other countries, but we're adapting them to our reality, to our context, of course, to our geography, and to our history and to our culture (Host 1).

Reasons for ending activity

Based on some of the interviewees' experiences, some TNE activities ended for several key reasons. Financial challenges emerged as a primary factor, with multiple institutions experiencing funding cuts, payment delays and financial difficulties for instance around taxes, that made projects commercially unviable. For example, one institution lost nearly all projected income when the host government funding was suddenly withdrawn, while another faced 18 months of payment delays due to complex international financial processes which did not make the project beneficial. Covid-19 disrupted relationships and prevented the realisation of collaborations which would have included benefits like staff exchanges and student placements. The pandemic also hindered institutions' ability to adapt and maintain international partnerships effectively.

Regulatory and structural barriers also contributed to project failures, particularly around awarding body issues and costs that priced colleges out of competitive markets compared to universities. Additionally, host country policy changes led to the termination of some partnerships, as governments decided to develop their own capabilities rather than rely on foreign providers, often recruiting cheaper local or international staff. Likewise, a change of government or key individual gatekeepers can disrupt and breakdown partnerships. Some of these key issues are discussed in greater depth in the 'Challenges' section on [page 42](#).

How are partnerships formed/initiated?

Based on the interviews, partnerships between the sending and host countries (whether this be government or institutional partners), which aim to work towards the establishment of TNE, are formed through several interconnected pathways, often requiring patience and long-term relationship building. Many partnerships emerge through government-supported mechanisms and institutional networks. The British Council has played a significant role as a facilitator of several partnerships, with colleges securing British Council projects that provide market entry opportunities, even if initially these are at break-even. Government trade missions, ministerial visits, and other diplomatic channels help open doors to providers looking to initiate TNE activity. There was evidence that the devolved nations of Scotland and Wales can offer a more coherent approach across the colleges for initiating international activity. For example, in Scotland, the government has supported international education through ministerial engagements, dedicated client-facing websites, and through start-up funding programmes such as the now defunded [Scottish Flexible Workforce Development Fund](#) and the [Scottish Education Exchange Programme](#) (SEEP).

A substantial number of partnerships form through agents and intermediaries who have deep cultural knowledge and established networks in target countries. These agents often work on commission-based arrangements, conducting initial groundwork and due diligence before formal partnerships develop. Some colleges describe working with 'nodal partners' (College 4) - individuals or organisations embedded in local contexts who can provide access to wider networks. The relationship-building process through these intermediaries was described as requiring significant trust-building over time.

Many partnerships develop through professional networks and through direct approaches from foreign governments and institutions. Conference attendance, trade fairs, and industry connections often lead to partnership opportunities. Colleges emphasised that international business development requires 'extremely patient' approaches, with partnerships described as 'very long courtships'

(College 1) that can take years to mature. Some institutions maintain dedicated international teams that actively travel to build relationships, which has particularly helped nurture and grow relationships. The strongest partnerships often emerge from sustained engagement where institutions demonstrate commitment through repeated visits and consistent communication, building the trust that participants consistently identify as essential for successful TNE partnerships.

Key impacts of TNE

This section explores the key outcomes that happen as a result of TNE in TVET. These outcomes are experienced by both the provider and host countries, as well as at national, institutional, and student levels.

Capacity building

Participants noted the strength of TVET TNE for capacity building, framing this around developing host country institutions, supporting pedagogical transformation, fostering entrepreneurship, and economic and workforce transitioning through skills development and upskilling.

UK-delivered teacher training, such as online diplomas, was seen to improve classroom practice in partner countries, introducing new teaching methods or upskilling long-standing teachers.

We've had some fantastic testimonials back from teachers in the Middle East about how it's changed their practice (College 1).

The focus of TNE TVET provided by UK FE colleges is typically driven by specific industry or government needs in the host country, it is targeted at international sectors facing skill shortages, and was noted in contrast to personal academic interests. In this way it is unlike HE, which is often shaped by individual ambition.

a need of an industry, a need of a government to mobilise its people to do jobs in a particular place at a particular time (Policy 1).

This is increasingly important amid shifting demographics and growing demand for future-facing technological skills. Another participant believes the UK's FE sector is effective at transitioning workforces, supporting individuals to re-skill, keep up to date, and move to new areas of work. He refers to how these strengths are seen as an ongoing opportunity to support different parts of the developing world by providing TVET.

If you think of Malaysia, you know, an agrarian-based economy, lots of forests, and suddenly they have a need for service industries and manufacturing ... massive upside for them in terms of having people that have the skills that are fit for purpose, rather than being overqualified in a simulated environment (College 4).

Attitudes to TVET

Perspectives highlight a complex and evolving landscape regarding the global positioning of TVET. There is growing recognition of the strategic importance of vocational education in addressing global skills shortages. In many cases, participants noted a perceptible change in how TVET is being positioned, whilst historically overlooked in favour of academic routes, vocational education is increasingly seen as critical for economic growth, particularly in countries undergoing reform or seeking to address youth unemployment and productivity concerns.

The zeitgeist is moving in our direction... vocational education is on the up. It's becoming a bit trendy now (College 1).

The employability of students in direct alignment with industry needs is central to the rising interest in TVET in some countries, especially in emerging and transitioning economies. TVET is increasingly viewed as a pragmatic solution to structural unemployment and economic underperformance. Countries such as Mongolia and Saudi Arabia are actively engaging in reform, recognising that vocational systems have historically been underfunded and underdeveloped. Host countries have recognised that visits and exchange programmes in partnership with the UK has helped change perceptions of TVET and positioned it so that people see it as 'a path to success' (Host 1).

Governments... are saying to us we need to speak to you urgently about our vocational school systems (AO 1).

Furthermore, TVET is well-positioned to lead in the development of modular, flexible and digitally supported forms of TNE. This flexibility offers a comparative advantage, particularly in rapidly changing or unstable geopolitical contexts. Some participants believe the potential of micro-credentials and immersive technologies will facilitate international collaboration and widen participation.

TVET is very well placed to do short, sharp interactions that might be stackable to a full qualification (Policy 1).

... in terms of geopolitical instability, it's making it very attractive to stay in your home country for two years and study your diploma to both the young people, but also to the parents (AO 2).

Despite these positive shifts, the perception of TVET as inferior to academic higher education remains a significant barrier. This is reflected in societal attitudes. In countries such as India and China, strong cultural preferences for university pathways are still prevalent among parents. These preferences may continue to undermine the uptake and perceived legitimacy of vocational alternatives.

The word 'vocational' has a terrible stigma attached to it (AO 1).

They call it sub-degree education... just that use of the term 'sub' is problematic (Canadian expert).

A recurring concern was also the narrow focus of some governments and diplomatic representatives towards traditional HE. TVET is often absent from scholarship schemes, policy dialogues, and some international education delegations, where many foreign diplomatic representatives themselves might have attended UK universities.

Government representation is purely focused on HE because that's all they understand... they talk about British universities such as Cambridge and Oxford (College 6).

This represents a missed opportunity for aligning education policy with labour market needs and for integrating TVET into international education strategies more effectively for some countries.

Some participants felt that widespread cultural change is essential to reposition TVET as a first-choice pathway. They emphasised the importance of sustained advocacy, targeting not only policymakers, educators, and employers, but parents.

It's the parental stigma that is a massive challenge... We need to educate the parents, the governments, the decision-makers (AO 1).

These findings suggest a growing momentum behind the inclusion of TVET within TNE agendas. However, realising this potential requires systemic and cultural change, both in policy and perception. This presents a timely opportunity to adapt education strategies to reflect contemporary economic needs and to ensure that vocational pathways receive parity of esteem with academic routes.

Political change

Shifts in government policy, whether sudden or strategic, can have profound effects on TNE, both positive and negative. Political change is seen as a defining, an often unpredictable force in the TNE space. Whilst it can close doors abruptly, it can also offer meaningful opportunities to support system-level reform and progression. Providers engaging in the TNE landscape are reminded to understand the political and historical context. For example, in the past many private companies with education commercial interests in China were offering programmes with limited progression opportunities into employment, these were driven and funded by parents' aspirations for their children.

The Ministry of Education 'rightfully' deemed that to be inappropriate insofar as many hard-working parents were spending up to 30% of their income on supplementary education ... the government there decided it was also creating an unequal society. This was referred to as the double reduction strategy ... a lot of people lost their shirt over it overnight (College 4).

FE colleges by their very structure are inclusive organisations and have sustained experience of working to meet UK government priorities and domestic skills needs. The insight shared by College 4, highlights their understanding of socio-economic considerations and desired system change. The college works closely with the Ministry of Education within the Chinese province to specifically respond to their needs, but they also build progression pathways for a top up year in the UK, to provide Chinese students with an opportunity to experience broader learning methodologies and equip them with skills for global markets. However, there can be tensions around openness and protectionism, between a country's interest to engage in international collaboration and its desire to protect or strengthen domestic systems. This ambiguity reflects the political sensitivity for both host countries and provider countries, where both need to consider future scenarios brought by political change. Research participants discussed how engagement with government can underpin systemic reform, where UK providers have been able to support national policy within vocational and skills development. One provider refers to an immediate impact on the host country's institution itself in terms of development of curriculum in Bhutan, where they have been working with the government in terms of national standards around their post-secondary quality framework for TVET saying:

We've been working not only with the institutions but also with the government... the impact has been significant (Canadian expert).

Others felt they were able to support government policy in Indonesia and Saudi Arabia, through engagement with ministries. Saudi Arabia's vision 2030 aims to reduce the country's dependence on oil and diversify the economy, with a further aim to increase female participation in the workforce and improve the overall quality of life for Saudi citizens. National agendas shape the scope and nature of TNE. Countries' internal political agendas, like China's five-year plans or Saudi Arabia's Vision 2030, play a defining role in what international providers can contribute. In particular, UK colleges believe they are well equipped to deliver TVET to diverse audiences.

We hosted the ministries... it's all-around equality and diversity and gender inequality ... influencing policy and practice and capacity building for students (College 3).

The common thread is that success in TVET TNE, requires navigating and responding to shifting political landscapes, but can also have a positive effect on foreign political agendas.

Income generation

Many providers identified their primary aim for TNE involvement is to generate commercial income. This revenue is seen as essential for covering some funding gaps and enabling longer-term strategic

investments. Participants discussed the pressure on their teams to generate commercial income with several pointing out that domestic funding limitations mean TNE is one of the few viable sources of significant additional income. As discussed in the reasons for initiating TNE section, they are using income generated from TNE to support wider college initiatives, such as keeping their resources up to date and providing UK students with global engagement opportunities.

Continuation from TVET TNE delivered in host countries can support inbound progression into second year groups at UK colleges. This was acknowledged as a way to make some marginal domestic provision financially viable. One example of infill of international student numbers into UK student groups was given, where otherwise the UK programme could not continue into a second year.

Some colleges who have been operating in TNE markets for many years have adopted a fully commercial approach, treating overseas activity as business ventures, with clear expectations for profitability and sustainability. One college has a strong track record of operations in Saudi Arabia which date back to 2014. Around that time, the UK government worked with the government in Saudi Arabia to encourage UK providers to engage in TVET TNE.

Whilst financial returns were discussed, participants see that TNE serves longer-term strategic goals such as international brand building and partnerships, which in turn may bring more funding or student recruitment opportunities.

It is about our reputation... a legacy of bottom-line contribution... maybe our work will pay for part of the STEM building in years to come (College 4).

One awarding body discussed their objective to support their government's International Education Strategy and the ways their work benefits the nation. In doing so they are developing brand UK.

Our work benefits the country, there is a clear economic return and the work that we do internationally benefits our organisation because it's a commercial stream of income. It takes the pressure off the public purse (AO 2).

In addition to revenue, the view of brand generation and longer-term growth was also reiterated by another awarding body.

Revenue... and building another part of the business for [awarding organisation] in a country we'd not been in (AO 1).

There has been variability in funding support for the development of TNE, this has become less sufficient with many countries facing economic uncertainty and a focus on domestic priorities. Although in some

cases there has been some seed funding, participants expressed concern that insufficient sustained government support may inhibit scale up of TNE operations effectively arguing, 'there's nothing there to take it up to the next level' (Policy 2). Whilst participants often acknowledged the educational and reputational value of TVET TNE, it is widely viewed as a crucial financial strategy for reinvestment to enhance domestic operations and a means to seek continued global business partnerships.

Internationalisation

Engagement in TVET TNE offers strategic value not only to UK institutions but also to host countries, students and staff, cultivating a broad spectrum of social, cultural and economic benefits. The reflections across the data show strong support for the notion that internationalisation is about much more than global branding, it is about reciprocal learning, capability building, and widening access to global experiences.

Colleges discussed how their TNE work, provides opportunities for international students and domestic students alike. For UK students from disadvantaged backgrounds, developing engagement opportunities with students in other countries helped these students develop global citizenship skills and enhance their employment opportunities:

We want to make them technically competent... good citizens... and give them a global outlook (College 5).

Having that global perspective is more and more important every day. We don't operate in silos (College 6).

In this view, internationalisation is a crucial component of preparing students for the modern world, where industries and labour markets operate across borders. Several participants discussed how students' experiences, whether through cultural visits abroad, joint projects, or inbound mobility into the UK for instance for top up courses at level six and where they learn side by side with domestic students, led to increased employability prospects and outcomes.

Hospitality students will work with the hospitality students in India and Indonesia ... joint projects together. ... In barista competitions, we are bringing our Chinese partners and Indonesian partners, and our partners together. It certainly adds value to any CV (College 3).

Internationalisation is also seen as a source of institutional and pedagogical enrichment. There is a clear emphasis on learning from others, not just exporting UK practices. Staff who collaborate with international partners are exposed to new ways of teaching, technological advancements, and developing shared policy frameworks; particularly around areas like AI, digital delivery, and TVET system reform.

When we go over there ... let's say that's intercultural, their teachers will get a feel for Western pedagogy (College 4).

It takes us out of our view of just the UK and makes us think differently about what's happening in the world of education (Skills 1).

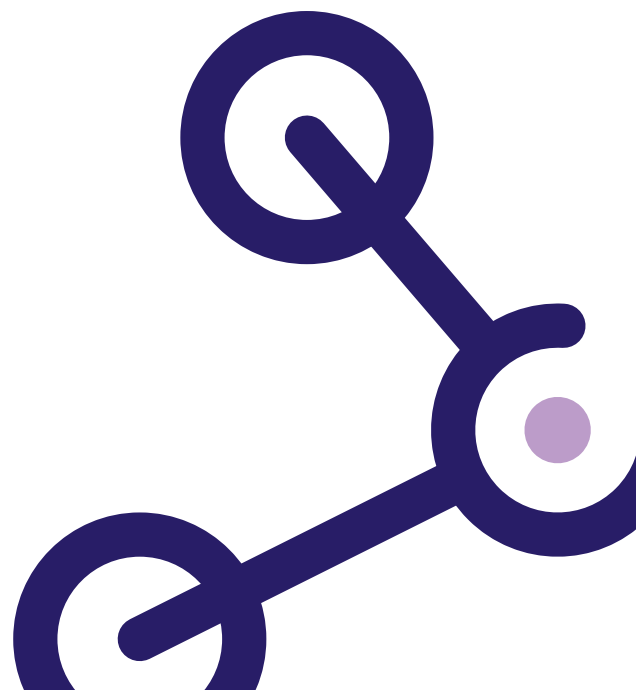
A reflexive approach to partnerships, highlights the two-way benefits of TNE where both parties learn and grow. The willingness of participants to engage critically with their own practice, demonstrates a strength in TVET providers' openness to recognise good practice and to continue learning themselves.

We're not the best at everything... there's lots of learning from other countries that can be gleaned (College 5).

The outbound mobility of UK staff is valued for its contribution to professional development which in turn inspires and motivates staff when working back in UK colleges. However, whilst many strengths were found, some participants also highlighted areas that require careful attention. One discussed disparity in how teachers are treated across cultural contexts, where without adequate support, staff can feel isolated or powerless. This reinforces the need for responsible planning, preparation, and an understanding of cultural sensitivities when deploying staff abroad. Despite this, many still report life-changing professional and personal growth.

No matter what happens, they walk away feeling like it's been a life-changing experience for them (Australian expert).

Overall, the perspectives shared present TVET TNE as a powerful instrument for internationalising education in inclusive, reciprocal and transformative ways, with strengths going beyond economic value.



Soft Power

Soft power is the ability to influence the behaviour of others and obtain desired outcomes through attraction and co-option, and is viewed as the work of governments, organisations, and individuals. There is widespread recognition from participants, that through TNE, UK FE sector plays a significant role in the UK's soft power and whilst common perspectives of soft power were presented, some perspectives varied.

One college sees soft power as nuanced and tied to cultural values and approaches inherent within the UK's educational pedagogy. They believe that a nurturing approach to develop creativity and innovation can lead to wider global benefits.

By adopting a gentler and nurturing approach to education... that kind of unlocking of individualism, I think translates into creativity, which in turn, translates to innovation. I believe our exchanges with other partners around the world will pay dividends for them. In the long term, it pays dividends for all of us, because a prosperous world is a more peaceful world (College 4).

FE providers are acting as ambassadors not only for the UK but also for their own nations. For example, Scottish colleges and the Scottish government were seen to promote Scotland and the UK in tandem. One Scottish college discussed their work with UK partners taking part in delegations attending other countries.

If we're out there, we're not just promoting Scotland, we are right there with the UK flag ... the Scottish flag ... there promoting Scotland and the UK as a tourist destination and an educational destination (College 3).

This college discussed how soft power is utilised to promote their unique identity and attract people to Scotland, presenting a wider brand reputation by capitalising on a key member of their staff, who is the National Chef for Scotland. The value of this was reinforced by another research participant from the Scottish government who further emphasised soft power with broader governmental goals, stating Scotland's soft power is:

... the expertise that lives in the nation's higher and further education sectors, supported by both international offices and UK-wide coordination (participant, Scottish Government).

In contrast, one participant believed that current efforts using the UK's soft power are under-communicated:

We're sort of hiding under a bush... we could perhaps do a little bit more... so that soft power becomes palpable rather than hidden (College 1).

Another participant viewed soft power as a form of relationship building:

... relationships with governments, with ministries of education, with industries and companies globally. It's building relationships with professional bodies that will be internationally recognised ... building pathways that will be in collaboration with them (AO 1).

By extension, participants believed that UK TVET overseas is highly regarded globally - not only for its content but also for its quality assurance, professionalism and outcomes, with each of these aspects in turn generating soft power. One college noted their overseas partners were not just seeking qualifications, they were buying an assurance of outcomes. Another linked soft power to the dual value of the English language and TVET training, pointing out that the UK has a strong reputation for supporting international students and employees in the language and communication of health and safety:

You see all the signs in Arabic, but English is the core sign when you deal with health and safety. They want all those elements of the training (College 2).

There is a shared belief across participants that UK FE has genuine global value, delivering education that is respected, outcomes-driven, and culturally influential. Some believe soft power is a way to promote branding and culture, whether this be the culture of a nation or cultural adoption of language, whilst others focus on nurturing partnerships that organically reflect UK education values and approaches.

Challenges

This section introduces some of the challenges that key players in the TNE in TVET space face.

Financial

Based on interview insights, raising sufficient start-up costs to scope a project and secure enough funds to develop a programme before it becomes commercially viable can be an issue. Participants recognise that there is opportunity for substantial TNE TVET engagement but without access to private funding, FE institutions are not able to compete with private sector bodies and universities already working in this space. Despite the opportunities for colleges to attend trade missions organised by bodies such as the Department for Business and Trade (DBT), there is no budget within much of the college sector to be able to undertake the initial development work that is required. As one interviewee explained:

The main issue is that most of the colleges don't have the funding or the staffing resources to be able to follow up as many of the opportunities as they might want to (Policy 2).

There are examples of seed funding in the TNE space, for example, Scotland have offered start-up funding for colleges via SEEP but supporting ongoing funding, staff resourcing and infrastructure is an issue, and sustained partnerships are difficult to navigate.

Whilst publicly funded colleges may be able to get involved with smaller projects, with the aim of developing a sustained partnership, large scale and ambitious partnerships can be challenging and there are limited mechanisms and processes in place for unlocking investment in international projects. Challenges also apply to the ability to provide guarantees against delivery of contracts, for example where some countries may require performance bonds to be in place.

There are potential governance risks for colleges from large-scale overseas ventures, as they are often beyond the core purpose of the college and failure could result in reputational harm as well as financial loss, impacting on domestic provision. However, some participants explained that they mitigate such risk through the creation of separate boards or governance committees, which are distinct from their governance for publicly funded provision, allowing for a degree of agility and responsiveness.

However, smaller projects can also be challenging as they are difficult to sustain beyond their initial scope. Despite gaining and developing partnerships, colleges may give away intellectual property for very little commercial return, limiting opportunity for further investment.

We could get to a stage where [a] project may lead to something rewarding for both parties, but in doing so I have to put at risk our domestic provision because I can't use my existing staff or I have to put that project at risk because I would have to recruit somebody for the project but they wouldn't have the background to [our college]. We end up just looking at [it] and going it's not worth it (College 5).

Challenges have also arisen from difficulties around financial negotiation and administration. Certain countries can fall out of the running for partnership development work because of currency fluctuations, taxation policies and volatile market conditions. Providers stated being at the mercy of government policy in the host country, giving examples of funding being pulled at the last minute, despite a significant amount of preparation work to set up provision and develop a partnership, and organisations shifting from bank payments to cash payments. Indeed, a host country expert explained that a lack of resources and changing priorities in their country and around the world mean they are not able to fund as much as they would like to. Slow and inconsistent payments create further financial challenges for UK colleges, particularly where there may be no mechanism in place to access working capital. The

length of time between the start of the project and the start of the payment schedule can also be difficult in terms of financial management. One college has ceased delivering TNE because of the unpredictability in receiving funds stating that it was difficult:

trying to navigate [the payment], resulting in at least 18 months beyond when we were due to be paid as a college...to actually being able to receive the money (College 8).

Administrative

An initial administrative challenge comes from the difficulties and complexities of starting up TNE provision from scratch, including ensuring that governing bodies can support the long-term investment and commitment to delivering education internationally and understand the value that such engagement brings for an individual institution, a region and the country itself. Because of the funding models and status of UK colleges, challenges around procurement can also be significant, with government constraints around spending making colleges less responsive and agile than independent providers and universities, for example in building up agent use and developing respective frameworks. Those involved with TNE projects reported the need to be meticulous with financial planning to mitigate any risk as would be expected, requiring time and levels of expertise within the organisation beyond the day-to-day running of domestic provision.

Interviewees directly involved in delivering TNE described the need to significantly customise projects to respond to different cultural norms in terms of business engagement and administration, from types of IT systems and platforms used, to differing levels of bureaucracies to navigate, making it challenging to replicate programmes with other countries efficiently and therefore slowing down further partnership development:

I think the whole project management, granular detail, step by step, forensic accounting of [the host country] has proven one of the biggest challenges for my team (College 4).

Key stakeholders also highlighted the challenges around visas for both teaching staff going to work in host countries and inbound students coming as part of their studies:

Visas are also a challenge if you've got visas, whether it's for teaching faculty, or whether it's for students, you know, doing exchange...different countries that will be more problematic into the UK than other countries. So that is challenging (Skills 1).

For staff, visa costs and administration are cited as a barrier because of the time and detailed information needed to meet visa requirements of many of the countries providers are working with; and having

dedicated administrative support is essential. In terms of incoming students, visas cannot be guaranteed for those accepted on an agreed course or programme of study. Providers are also navigating changing visa rules and regulations both in the domestic and host country arenas. One participant raised the issue of potential visa challenges for inbound vocational students in particular stating that:

...it can become complicated and expensive. If you are someone that is studying at a vocational college overseas, maybe you don't come from the background or have the level of income required that is necessary for a student visa, for flights, for immigration, health surcharge, and maybe you've not been able to access that level of education either (College 6).

Additionally, those working in the FE space reported being at a disadvantage compared to universities for foundation level courses regarding visas. A student studying for a foundation year at a university can progress onto the full undergraduate course on the same visa, whereas they would require a new visa to progress from a foundation course at an FE college onto an undergraduate course at a different institution, thus impacting on ability to promote progression opportunities and build up capacity for international engagement more broadly.

Political

Political challenges were another area highlighted by those interviewed for the research, with geo-political instability identified as a major risk to the completion and sustainability of TNE projects. Changing political agendas brought on by new governments and leadership or changing policies from current administrations can have a significant impact on the success of a project, with examples given ranging from the abandonment of government-funded and supported initiatives because of a new government and changes in political direction, to the introduction of new tax rules having an impact on the costings of a project. Strategic direction can change overnight. Some of those involved in the research commented on the need for education to be as far removed as possible from the political arena to mitigate against the ramifications of political change. One participant argued that:

our mission [is] to change lives through learning...it needs to be focused on education as a force for good in the world, and we are in the business of education. We're very good at it, and we want to engage, and we want to exchange, I think, beyond that, that policy needs to support with opportunity [and] vision to join the dots (College 4).

When projects are tied closely with political agendas and donor financing, they often focus on shorter-term projects, with long-term initiatives remaining more challenging. Donors often provide up to five years finance limiting sustained growth and development of a long-term partnership. Those interviewed with

significant experience in partnership work drew attention to the conflict between supporting local education and providing a long-term model or programme for a country, as there is at times a limited focus on creating capacity building opportunities, and ultimately a mismatch between the education and training outputs (i.e. the number of people who have developed their skills and gained qualifications) and the actual number of jobs or progression routes available requiring higher level skills.

Periods of political instability and unrest in a country can also impact on the length of time it takes to initiate a project and influence the viability of a project owing to security risks:

We have projects in East Africa....and [in] Ethiopia, there is a significant level of risk outside of the capital. So we do not have anyone going outside of the capital...so there's a risk around security. Last summer, we were sending a delegation for activity in Kenya, and there was civil unrest in Nairobi with protests, and so we cancelled the trip, we postponed the trip, and the delegation went in January (Canadian expert).

Political bureaucracy and differing systems also pose challenges, impacting not only on financial administration as noted already, but also on project management and timescales:

Some countries are highly bureaucratic. I mean we are to some extent, but in other countries, there's lots and lots of levels, layers that you have to penetrate before you can get decisions made... and all of that takes time (College 1).

Staffing and recruitment

Having the right members of staff able to engage with TNE work at the right time was also cited by stakeholders as being problematic for a variety of reasons including meeting UK contractual obligations, availability of expert staff to work in different countries, staffing restrictions from host countries, and having a staffing infrastructure in place for business development. Staffing is widely reported as a challenge across the UK FE sector, and not just for the set up and delivery of international provision. TVET programmes often require teachers with specific and niche areas of expertise who are difficult to recruit, such staff often have extensive experience of working in industry and can potentially be expensive:

if we want to employ somebody who is ex-industry [with] cutting edge engineering qualifications who's worked in one of the big defence companies globally, that's quite tricky to find, and quite expensive to find (College 2).

Participants commented on some of the constraints arising from contracted teaching hours of permanent staff within an institution, impacting the ability of a provider to respond flexibly to staffing TNE provision,

as different contracts are usually required. Providers also reported capacity challenges as staff are often fully utilised for home students, limiting the availability of internal staff for international work. There are additional costs to consider when experienced staff are utilised for international work, to ensure the continuation of quality provision for domestic students. As one provider explained:

Securing buy-in from internal stakeholders is quite challenging at times, because obviously they have their jobs. If I want to deploy teaching staff, where do I get them from? ...The teaching staff are fully utilised for the benefit of domestic students (College 4).

A further barrier is attracting people who want to work internationally amidst a possible decline in those wishing to work in different countries. It is potentially more challenging for those with families and doesn't suit the lifestyle of many. Some countries are seen as riskier in terms of security or not aligned with values around gender equality or disability for example. One interviewee also highlighted the impact of different models of TNE on recruitment, with the shorter 'fly in, fly out' model used commonly in HE easier to recruit for compared to the longer-term teaching required in the TVET space to deliver a complete diploma (Australian expert). Ultimately, as one participant explained:

Recruiting some people from UK FE to go over and spend and work [in a different country] on a two-year contract or something, I think that's a difficult space for us to be honest, because often it's difficult to find the people who want to do that frankly (College 2).

There are additional complexities from some host countries because of their policies on recruitment, for example, in China anyone aged 60 and above is no longer eligible to teach, again limiting the pool of potential lecturers with the relevant experience and expertise.

The evidence suggests that having an international team, including those working on developing partnerships and to drive opportunities forward is critical but not many have such infrastructure in place.

One interviewee described the discrepancy between the FE and HE sectors in terms of staffing for international work as an issue:

I think this is where we really are disadvantaged compared to universities, who have people out in country all the time (College 6).

Institutions are also often managing internal leadership and staffing change, potentially putting programmes and projects at risk:

If you have a change in leadership, or a change in any key individuals, that can also have an impact on the partnership and the programme as well (Canadian expert).

Cultural and educational

Participants described a wide range of cultural and educational challenges pertaining to the development of an accessible system or programme. Language differences often pose an initial barrier in setting up a project as contracts need to be translated and language creates challenges within the delivery of a curriculum itself, although the role of technology and translation tools has overcome some of those language barriers. Different pedagogical approaches can also prove challenging, with some countries used to more didactic and traditional rote learning styles, compared to more independent and self-directed learning styles used in education systems such as that of the UK.

A number of interviewees commented on some of the challenges around the development of appropriate curriculum content, identifying the need for flexibility to create content that is relevant and culturally sensitive to the host country. Some specific technical skills are not easily transferable between countries e.g. skills to manage electrical systems and wire houses, and it is more effective to develop content based on universal expectations around skills needed in specific technical spaces. A further issue raised by key stakeholders in terms of curriculum was around alignment of content to meet cultural expectations of the host country.¹⁰

Differing attitudes to education more broadly must be navigated. For example, perceptions about the teaching profession within a host country and the social value assigned to them. Overall, cultural differences in terms of education take time to negotiate, particularly when there could be an uneven power dynamic. However, as one expert working in this space noted:

I would hope that this translates to any of our international activity, that this is about partnership. It's about building together. It's about being very, very culturally aware and sensitive and very aware of the sensitivities around the local context (Canadian expert).

10

One interviewee gave an example from a Human Resources qualification with content on affirmative action. A very practical unit on the implementation of affirmative action policy is not relevant in a country without a policy culture of affirmative action. Whilst it can be taught as a concept, it is not meaningful to teach its implementation into a HR system, as it too removed from actual practice.

A final cultural challenge, and one that has been noted already, is around perceptions of TVET education. Some countries, including to some extent the UK, continue to view a degree, especially master's degrees and PhDs, as the ultimate goal of education and continue to reject a more vocational and technical education approach and the policies required to invest and support a breadth of educational opportunities.

Qualification systems and regulation

The UK tertiary system is a complex space with crossover between the offer of different types of provision, for example, universities delivering foundation degrees and Higher Technical Qualifications (HTQs), which are also delivered in the FE college system. FE colleges also deliver degree level qualifications, although usually in partnership with a university, as very few colleges have degree awarding powers.

A key stakeholder highlighted one of the key challenges sits with the qualification landscape overall and:

...getting programmes awarded with awarded qualifications. It is because colleges are not awarding bodies. So, for example, in China, we can't award our programme. But our competitors, like the Australians, they're often self-awarding bodies (College 2).

This requires further education TVET TNE providers to work in partnership with AOs, and to work within their regulations and quality assurance processes. Ultimately this reduces overall income and potentially decreases flexibility of offers, allowing universities to dominate the foundation and progression programme space as they have the agility within their systems to create and award qualifications and are not beholden to when and where a qualification is licensed to be delivered. When an AO awards a qualification that is delivered by providers in the domestic market, this is also regulated by Ofqual (or regulatory bodies within the devolved nations) in the international market. When a qualification is regulated, it can signal rigour and credibility to overseas governments, employers and students because of strict quality assurance processes like assessment reliability, standardisation, the UK's structured framework of levels for comparability, and public accountability. However, if a qualification is not already being delivered in the domestic market, then it is not regulated overseas by regulators such as Ofqual. Whilst AOs create customised qualifications for overseas markets, these will not appear on regulated qualifications list. AOs can also discontinue qualifications which is an additional risk factor to consider when a programme has been built around a specific and branded vocational or technical qualification:

So, without the ability to create our own qualifications or deliver our own, you know, credit our own qualifications, we are at the mercy of that sort of thing happening, which is a little bit of a challenge (College 6).



Looking to the future: Opportunities for TNE in TVET

Partnership formation, networks and local knowledge

Successful international TVET expansion requires strong local partnerships and cultural understanding. Key stakeholders emphasise the importance of having well-informed local agents, colleagues or institutions who understand the local education ecosystem and can effectively support student recruitment. These partnerships are best developed through sustained and structured communication to build trust over time. As interviewees noted, trust is fundamental and takes time to establish. The British Council, as the UK's cultural relations organisation, is well placed to support the UK TVET sector in establishing sustainable partnerships and relationships built on trust with government and sector stakeholders overseas. Building on its knowledge and experience of what works from many countries where it has presence, the British Council has a unique role in supporting the TNE ambition of the UK partners, building on their strengths and adding value to their work.

Structured communication protocols and project initiation documents help ensure clear expectations, timelines, and milestone tracking between partners:

Make sure you get everybody on board locally as a strategy and as a purpose, and get the relationship worked out, and then go for it, but be patient. Take your time. Find the right partner, do a little bit of due diligence to make sure that you know it's the partner that you want to work with, that you've got a lot in common, you both [...] share the goals and objectives of whatever the project might look like. And then be prepared for a few bumps in the road. Be resilient (College 1).

The preparation phase is critical for success, requiring thorough planning around clear expectations from all partners, regulatory requirements, and programme adaptation needs:

We have something called a project initiation document that details how we're speaking, how we're communicating on a very regulated basis, so that there is a constant [...] of who's involved, who's going to be informed. So only a successful project, when you know you've got those key components in place, and you've sorted out the timelines and you've created the milestones so that everyone's clear as to what you're aiming for (Skills 1).

Providers must invest significant resources in groundwork, including establishing clear communication frameworks and providing comprehensive support and preparation for teachers who are going overseas. One expert noted that it can take three years to embed anything: 'a year for

design, second year for implementation, third year you've got more of a steady state' (Skills 1). Furthermore, if something does go wrong, partners should continue to communicate and reflect in order to build lessons into future planning scenarios. Ultimately stakeholders agreed that TNE can be risky, this must be acknowledged and potential risks addressed.

Growing recognition and demand for TVET

As discussed in the outcomes section above, interviewees argued that we are witnessing a growing interest in vocational routes globally. There is increasing international recognition of TVET's strategic importance in addressing skills gaps and supporting economic development. Countries are prioritising workforce development with 'future focused skills training' (College 6), particularly in STEM industries and considering green technologies, where rapid changes are creating demand for new technical competencies. This shift is driven partly by graduate unemployment in traditional university pathways, leading to greater emphasis on applied education with taking subjects and qualifications that directly relate to jobs.

a greater emphasis on TVET, especially, even in the case of China, where they're seeing all these graduates coming out of universities, not getting jobs. So we know applied education and those linkages with the industry are really, really critical (Canadian expert).

Some interviewees suggested that student preferences are also evolving towards shorter, more practically oriented courses that provide clear pathways to employment. Young people are becoming more strategic about career outcomes, showing less willingness to spend three to four years in university programmes that may not adequately prepare them for the workplace. In some cases, parents are beginning to change attitudes in this direction too. Some argued that young people's reduced attention spans and digital learning preferences are reshaping educational delivery models towards shorter, more focused programmes. These factors are all creating more potential opportunities for TVET providers to deliver TNE.

Demand is changing within and between different subject areas and sectors as well. An interviewee (Host 1) anticipated that with the increasing prominence of AI, not only will all sectors need to integrate this into their learning but also that TVET TNE should focus on the development of human skills. Furthermore, AI, coupled with ageing populations means that TVET areas such as social work will become even more important. A host country interviewee explained that they look towards Europe who are regarded as having excellent experience in this sector.

Digital innovation and pedagogical adaptations

Despite some arguing that TVET is more difficult to deliver online compared to HE because of the competency basis and observatory nature of the courses, there are growing opportunities to embrace digital and virtual delivery in the TNE space. The Covid-19 pandemic accelerated digital transformation in TVET delivery, creating unprecedented opportunities for virtual and hybrid learning models. Advanced technologies including AI, virtual reality, and augmented reality are enabling innovative delivery methods that transcend geographical boundaries:

We have technology where you could have a master class going on in culinary arts, for example, in one country you're sharing with a group of chefs learning in another country, there's no reason that we shouldn't be using modern technology really well, [...] you don't have to fly people into a country to deliver it. You can be doing it virtually (Skills 1).

These developments are coupled with the growth of micro-credentials and flexible learning pathways that align with industry needs for rapid skill development. Despite some concerns about delivering competency-based TVET programmes online, institutions are successfully adapting to offer short, targeted interventions that support lifelong learning. This learning offers a 'critical opportunity for short, sharp interventions that colleges could be maximising on [in TNE]' (Skills 1).

British reputation

The British education system's reputation provides a strong foundation for international expansion. One host country interviewee described the UK as one of the:

classic partners who are always there....our classical partners have always been there, and their partnership has been stable over the years (Host 1).

The British system is seen to have expertise and excellence which makes it a safe country to partner with. However, only a small proportion¹¹ of the UK's approximately 270 colleges are currently active in international markets, suggesting significant untapped potential for growth. There were some concerns that soft power is not always realised in terms of the TVET system compared to universities' provision. There is a strong understanding and prominence of what British universities are doing in the TNE space, but far less understanding of what colleges are doing in the international arena, for those that are active. There could be more

opportunities to bring the activity to the forefront, from colleges having areas of websites that showcase their international activity to MPs visiting their local colleges to better understand the TNE activity taking place. The British Chambers of Commerce have an education remit and have the infrastructure to support potential overseas activity.

There is opportunity to further strengthen the British reputation for TNE in TVET through a fair and accessible immigration system. Stakeholders remarked on the challenges colleges face compared to universities due to for instance visa restrictions facing students who wish to progress from FE to HE in the UK, as discussed on [page 43](#). The policy must reflect the opportunity for TNE in TVET which might require students or faculty coming in and out of the country for a period of time to visit and study. For example, a college highlighted the difficulties of gaining visitor visas for a summer school.



¹¹

For example, AoC's International Survey for 2023/24 found 44 colleges (of the 87 survey responses) reporting international activity. Yet note that this activity may go beyond only TNE.

Recommendations

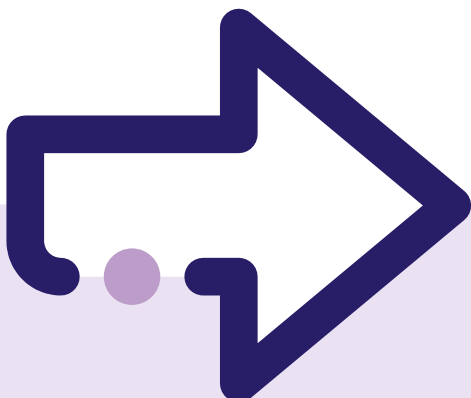
The following recommendations based on the research findings were drawn up to help shape a better enabling environment for future TNE in TVET. They span four key themes with eight individual recommendations to be taken forward by providers, policymakers and TVET stakeholders.

Policy

- 1. Address mobility requirements for students and faculty to move between countries for educational purposes**
 - Continue to make the case for UK policy that supports TNE and removes barriers to the development of international collaboration and partnerships.
- 2. Assess the potential of TVET TNE to support UK soft power initiatives**
 - Acknowledge the soft power potential of TVET TNE in any future iterations of the UK's International Education Strategy. The strategy should recognise both the economic and cultural benefits of TVET TNE, clarifying and strengthening the UK's soft power initiatives by defining how soft power can be leveraged to represent TVET and colleges more effectively in international contexts.
 - Support the development of a long-term vision for TVET TNE, ensuring alignment across skills and migration policy.
- 3. Address barriers for UK colleges when competing for TNE work**
 - Support continued dialogue between government departments and publicly funded providers to overcome regulatory barriers that prevent TNE expansion.

Data and intelligence

- 4. Develop mechanisms for the systematic collection of UK TVET TNE data through relevant UK government departments and the devolved nations**
 - The British Council in partnership with the government should establish a standard definition of TNE for TVET to support the successful capture of TNE activity, understanding that this may differ from HE due to the complexity of the TVET sector.
 - Relevant governmental departments should develop systems for collecting and analysing TNE data across the TVET sector, drawing on existing models from countries like Australia and previous initiatives from within the UK. This should include a comprehensive scan of all the TNE activity taking place in UK public and private providers.
 - Establish standardised measurements, such as the reach and outcomes of TNE activities. Collecting an evidence base could highlight income generation; lead to national policy development supporting training providers to engage with TNE; lead to collaboration at local and national level; and drive opportunities to expand TVET TNE.
- 5. Explore options to establish a repository of TVET TNE practice to support providers working in this space**
 - Establish a freely-accessible centralised resource hub containing practical guidance, case studies, and best practice examples across the four nations to support providers in developing and delivering TNE programmes effectively.



UK representation and promotion

6. Continue to engage key stakeholders in the promotion and profile-raising of TVET TNE

- At UK and devolved nation levels, continue to grow the representation and recognition of excellence in skills education, ensuring it is given equal prominence alongside HE. Continue discourse building on the specific characteristics of TVET, such as its proximity to the labour market and its potential of direct economic impact.
- At a regional level in England, follow effective practice from the devolved nations (for example the Welsh and Scottish Government models of offering dedicated support, including advice and door-opening opportunities for colleges) to promote TNE opportunities to a broad range of stakeholders.
- At a local level, raise awareness of international and TNE delivery by TVET providers with their MPs, chambers of commerce, and mayoral strategic authorities, to grow the stakeholder base for the sector.

Providers

7. Conduct thorough due diligence aiming for sustainable models and practice

- Select one or two TNE areas that align with provider expertise and USPs. Ensure the TNE offer aligns with the host country's market needs and local context through a systematic needs analysis.
- Develop contingency plans and maintain strong and open dialogue between partners to mitigate against exposure to policy changes, geopolitical shifts and financial volatility, particularly in high-risk operating environments.
- Secure strategic buy-in across all levels of the organisation through integrated strategies that unite different functions around common international objectives. Employ designated staff committed to TNE activities to support development, promotion and delivery of provision.
- Focus on building local capacity overseas so that initiatives are sustainable after programme completion.

8. Raise organisational profile and awareness of the TNE offer through the development of networks, short term programmes and increased digital presence

- Investigate opportunities to expand the delivery of international skills through platforms such as the UK Skills Partnership and the British Council global networks. Short term programmes (e.g. summer schools) and networking events can help build relationships and international provision.
- Explore collaborative partnerships with other providers to strengthen the TNE offer. Partner with institutions that have complementary skills, international experience or specialised knowledge.
- Enhance international profile through digital presence and strategic communications to regional, national, and international stakeholders about global activities.



Conclusion

TVET TNE activity has been less prevalent than TNE delivered by HE providers, despite the opportunities it can offer to FE colleges and other TVET providers. This report provides an initial insight into how TNE operates in the TVET sector, who the key stakeholders are, what benefits and challenges it presents, and examples of practice occurring globally. It demonstrates the richness of existing TVET TNE, but it should only be considered as an opening of the discussion ahead of further research of TVET TNE activities at the macro, meso, and micro levels, particularly when more reliable data emerges.

In this discussion, the global significance of TVET is central, its close alignment with the world of work and, by extension, the economy is particularly prominent, allowing it to make a distinct contribution to TNE. TVET focuses on skills development and preparation for employment. Individuals who complete TVET programmes and enter the workforce contribute directly to economic growth, a particularly important consideration for low- and middle-income countries. TVET's connection to the labour market and the economy is unique.

The level and mode of engagement with TNE vary significantly across countries, continents and regions. Within the devolved nations of the UK too, international education strategies show differing levels of emphasis: Scotland focuses on enhancing its global educational footprint, while Wales seeks to raise its international profile. In Northern Ireland, the main development supporting the internationalisation of the HE and FE sectors is student mobility. Furthermore, the UK's most recent policy changes on immigration may hinder inbound student mobility as well as some forms of TNE in TVET, such as partnership development and education export opportunities. The TNE policy context in the devolved nations differ, and policy should both enable and encourage institutions that wish to engage in TNE.

One of the biggest challenges this research encountered was the lack of comprehensive or systematically collected quantitative data on TNE in TVET in the UK that provides an up-to-date picture - including data on activities, participant numbers (students and staff), programme types, levels, delivery models and target countries. Such data would help identify trends, scale, reach and impact,





and support strategic planning for growth. Although recent efforts to gather and analyse data have limitations (e.g. [Value of UK Skills Sector Exports report, Government figures published in June 2025](#), AoC annual survey data for [2023/24](#) survey), they suggest that TNE in TVET represents a substantial activity in terms of scale and economic value. This reinforces the need for a more systematic approach to data collection to build a comprehensive understanding of TNE in TVET delivered by UK colleges.

Recent data from various sources (see the ‘Data and Challenges’ section), together with interviews conducted as part of this research, present a diverse range of TNE examples shared by providers. These collectively offer a fuller picture of TNE activities in UK TVET. The TNE TVET landscape is highly complex, and the level and extent of FE college engagement varies significantly. This study is one of the first to combine the limited publicly available quantitative data with qualitative interview insights from international and UK-based experts and practitioners.

There is a wide range of TNE models in TVET, underscoring the significance of this activity in the FE sector. Most of the FE colleges interviewed reported using multiple models tailored to their expertise, resources, and opportunities. These models reflect the agility and responsiveness that skills development offers in any national or regional context, including the co-development of training with home and host stakeholders. However, skills development also introduces added complexity for the UK FE colleges. For instance, FE providers do not have awarding

powers, which complicates TNE delivery in TVET. All TVET TNE activities must be supported by qualified staff, who in many instances must also be occupationally competent, to ensure both quality and culturally appropriate delivery. While having a designated international department or team is not standard practice, colleges that do have such structures find them essential for supporting TNE activities, including develop partnerships and making necessary staffing arrangements.

Several factors can enable, restrict, or prohibit TNE in TVET across both home and host countries. Access to **funding** is a key enabler for developing successful partnerships and delivering TVET programmes. Long-term funding is essential for sustainable TNE activities. Funding streams are diverse, spanning private, public, and individual sources. The absence of such funding leads to disengagement or limited TNE activities.

Strong partnerships are fundamental to TNE. Evidence suggests that long-term **partnerships** generate more meaningful impacts, and the development of trusted relationships yields multiple benefits for stakeholders. Establishing and maintaining such partnerships requires commitment through regular and consistent contact and communication. Building trust takes years and in addition to developing relationships it is based on demonstrated, high-quality TVET delivery.

High-quality TVET TNE cannot exist without **well-trained delivery staff**. Regardless of whether delivery occurs in the home or host country, success

depends on the presence of qualified, committed teachers and trainers who understand the local social, political, and economic context and can tailor their teaching accordingly. These professionals work directly with students and institutions and are critical to implementing TNE in TVET.

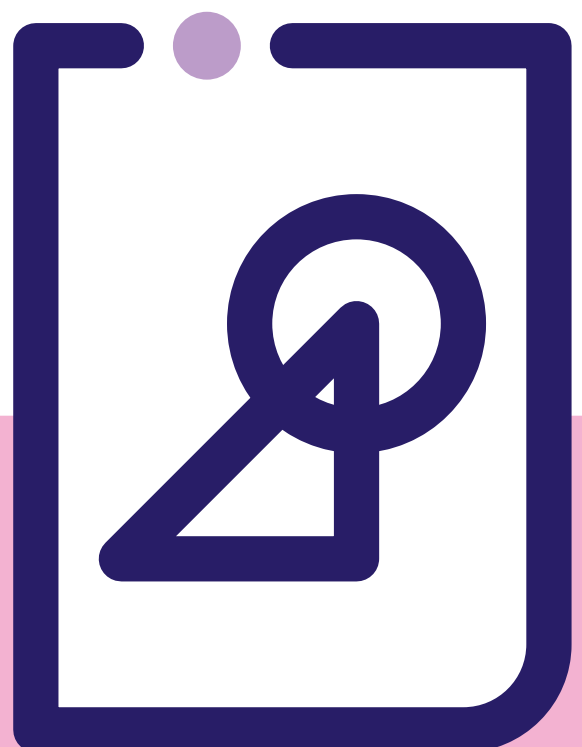
Political changes and shifts in policy direction can significantly influence TNE activities, both positively and negatively. Such changes can abruptly halt activities or create new opportunities for systemic TVET reform, including more inclusive models for underrepresented groups such as women. The political landscape can be challenging and sensitive to navigate but remains a central factor affecting the success of TVET TNE in both home and host countries.

The wide-ranging examples of TVET TNE from the UK and beyond demonstrate a variety of benefits and challenges, as evidenced in this research. For FE colleges to engage, TVET TNE must be financially viable. Colleges are public entities and often have limited access to loans, for example, and they rarely have surplus funds to invest. Such restrictions can hinder the development of sustained partnerships, creating barriers to participation in large-scale projects. Other challenges may include the complexity of establishing TNE initiatives, the time and resources required for project customisation and contextualisation, and the process of obtaining visas. Political instability and bureaucratic hurdles further complicate the already challenging environment of developing and maintaining TVET TNE. Nevertheless, internationalisation of FE has been acknowledged as an important aspect of college activities.

Evidence suggests that benefits exceed challenges in terms of scope and impact. These benefits span from individual advancement to broader global gains. While TVET TNE clearly offers crucial income diversification for the FE sector, enabling long-term planning and making locally focused TVET delivery viable, it also brings broader, more profound benefits.

Examples include capacity building, supporting pedagogical transformation, fostering entrepreneurship, enhancing the reputation of TVET, reducing youth unemployment, promoting inclusion through education, and developing global citizens. It is evident that TVET TNE can be a powerful tool for inclusivity, reciprocity, and transformation, far exceeding its monetary value.

This research represents one of the first systematic efforts to unpack TNE in the UK's TVET sector. FE institutions engage in TNE according to their expertise and available opportunities. There is a clear opportunity to further develop and strengthen the UK's TVET brand internationally. Current examples demonstrate that TNE in TVET can be a viable and mutually beneficial model for exporting UK expertise, benefiting local, national and international stakeholders. However, like all international work, TVET TNE must be carefully contextualised. TNE holds great promise for cross-border learning, drawing on evidence and the experiences of others. To support and expand existing practices, structures should be put in place to overcome known challenges and maximise benefits. Practical recommendations for addressing these challenges and promoting opportunities have been provided in the previous section of the report. The unique features of TVET, particularly its close connection to labour market preparation, give the FE sector a potential competitive edge in the TNE space.



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