

21st April 2016

# PURPOSE OF RESEARCH

## **TVET REVIEW**

- FAB / British Council want to help AOs expand into new markets
- Global economic trends
- Indicators and potential opportunities

## **AO DIRECTORY**

- Comprehensive view of UK awarding organisation sector
- Match AOs with opportunities
- Provide appropriate services

# What is THE TVET Research Saying?

## A global picture

- Youth unemployment in MENA of 30% with estimated 10.7 million new entrants to workforce in the next decade
- A quarter of Africa's young people are either out of work or not in education.
- 470 million jobs are needed globally by 2030.
- TVET an increasing focus of Governments to tackle complementary challenges i.e. civil unrest
- <http://www.unevoc.unesco.org/go.php?q=World+TVET+Database>
- Sustainable Development Goals: 4 on TVET

# Global annual GDP growth projections (%)

	2013	2014	2015 (f)	2016 (f)
World Output	3.4	3.4	3.3	3.8
Advanced Economies	1.4	1.8	2.1	2.4
United States	2.2	2.4	2.5	3
Euro Area	-0.4	0.8	1.5	1.7
Japan	1.6	-0.1	0.8	1.2
United Kingdom	1.7	2.9	2.4	2.2
Canada	2	2.4	1.5	2.1
Other Advanced Economies	2.2	2.8	2.7	3.1
Emerging Market and Developing Economies	5	4.6	4.2	4.7
Commonwealth of Independent States	2.2	1	-2.2	1.2
Emerging and Developing Asia	7	6.8	6.6	6.4
Emerging and Developing Europe	2.9	2.8	2.9	2.9
Latin America and the Caribbean	2.9	1.3	0.5	1.7
Middle East, North Africa, Afghanistan, and Pakistan	2.4	2.7	2.6	3.8
Sub-Saharan Africa	5.2	5	4.4	5.1

Source: International Monetary Fund

# Factors affecting AO's

*Clearly, security, prosperity and age demographics are important as shown above*

*However also*

- *The perception of TVET. Many countries, in East Asia and Wider Europe in particular, are taking significant steps to challenge the entrenched deficit of esteem in Vocational qualifications*
- *Confidence in qualifications or the “currency”*
- *Price points and the market conditions*
- *The effect of post-oil economies and shifts in government policy*
- *Local understanding*

# General Trends we see in our work

- Move towards occupational standards
- Importance of the currency of qualifications
- Rebirth of apprenticeships.
- Core skills
- Market for qualifications is diffuse but some areas like ASEAN working on common standards.

## The global market

There are a lot of competitors...

But

## The UK has a great reputation

- Seen as having high level of quality
- Valued for being employer led
- Qualifications have high currency so are seen as desirable

# The highest rates of growth are forecast to come from Asia and Africa

From 2012 to 2025 the British Council estimates an increase in local enrolments in tertiary education of:

- 3.4 per cent annual average in India
- 5.7 per cent in Nigeria
- 7.9 per cent in Angola
- 10.1 per cent in Ethiopia
- 6.8 per cent in Kenya
- 5 per cent in Pakistan
- 3.8 per cent in Sri Lanka



# Awarding Organisation Directory Research HIGHLIGHTS



# Methodology / survey RESULTS

- Thank you
- Targeted 160 FAB members.
- 109/160 responses in total.
- Phone calls / web sites.
- Still opportunity to add your organisation.

# How many countries are your assessments delivered in?



# What are THE Current top countries?

**China**  
**India**  
**Ireland**  
**Malaysia**  
**UAE**  
**Hong Kong**  
**South Africa**  
**Cyprus**

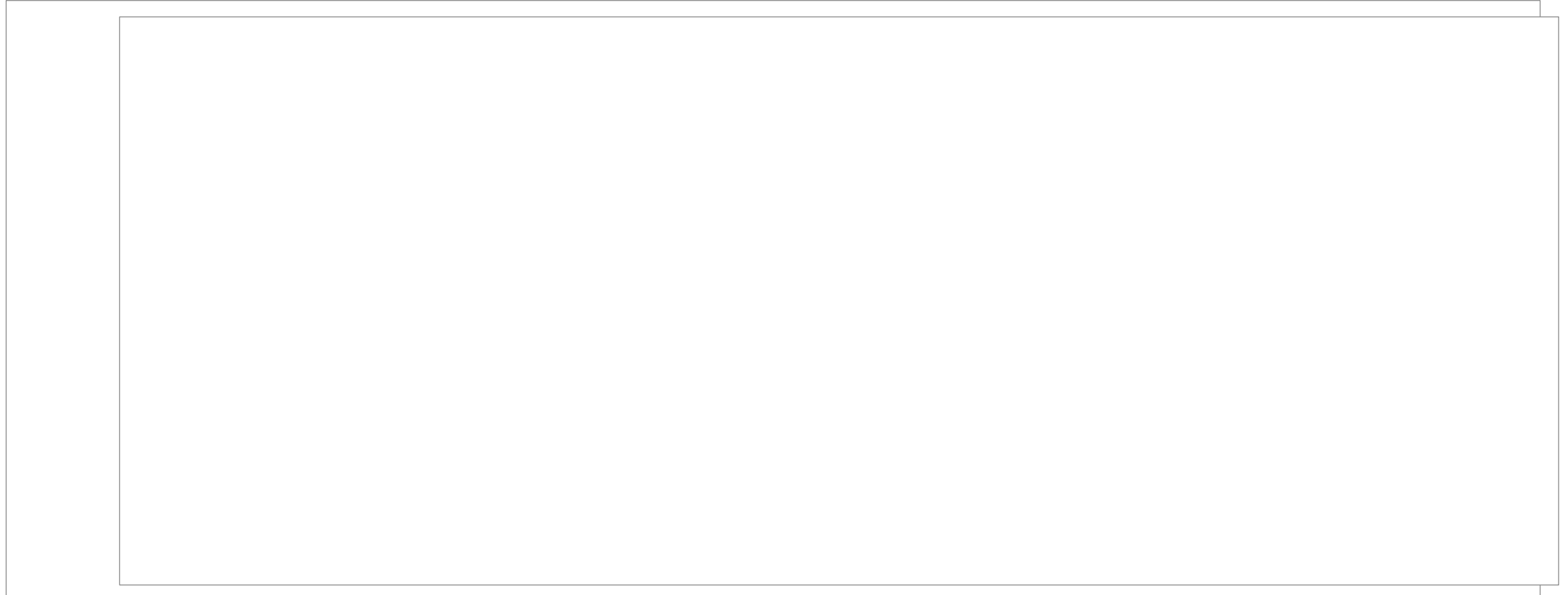


# What range of income is Generated from Your overseas assessments?



# Do you have plans for offering assessments overseas?

# What is your time frame for delivering assessments overseas?



# Target REGIONS

## Middle East



## British Asia



## Africa





**Do you face any of the following challenges in protecting your reputation of your qualifications?**

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	Challenges	% of Responses	BC Services
1.	Quality assurance inspections and spot audits	60%	*
2.	Compliance with UK best practice in Equal opportunities, Health & Safety & data Protection	45%	*
3.	Checking the identity of the candidate	40%	*
4.	Quality of invigilation	36%	*
5.	Security of confidential materials	34%	*
6.	Quality of risk management and contingency planning	33%	*
7.	Customer services	21%	*
8.	Same organisation provides training & invigilation	21%	*
9.	Communication issues with the assessment provider	16%	*
10.	Technical and connectivity issues when delivering CBT	9%	*

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## Do you face any of the following challenges in GROWING YOUR BUSINESS OVERSEAS?

	Challenges	% of Responses	BC Services
1.	Finding good quality course providers for your qualifications	62%	*
2.	Growing recognition for your qualifications	62%	*
3.	Understanding legal and regulatory barriers	51%	*
4.	Gaining access to government, industry and academic decision makers	46%	*
5.	Making effective decisions about which cities and countries to target	41%	*
6.	Finding an effective local marketing partner	36%	?
7.	Restrictions on foreign currency movements	11%	*

## **NEXT STEPS / COMING SOON**

- East Asia Research
- Enhanced menu of services
- You can still take part in the research

# questions

- Who do they see as the main competition and why?
- What do they see as the trends in TVET?
- Given the data, why are such boards looking at opportunities overseas?
- Does anyone see delivering international expansion as a way of mitigating the challenges which will be happening?

**Thank you!**