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Global Players, Local Changes: The European Union's Impact on Vocational Education Reforms in Azerbaijan

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Submitted in fulfilment of the requirements of the
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Abstract

This dissertation uses Azerbaijan as a case study to investigate how international organizations, particularly the European Union, shape and guide VET policies in developing nations. Through an in-depth case study of Azerbaijan, a non-EU member country that underwent VET reform with EU assistance, this research illuminates the complex interplay of political, economic, and cultural factors shaping the adoption of EU-endorsed VET mechanisms. Employing a qualitative approach grounded in the Cultural Political Economy (CPE) framework and a historical institutionalist perspective, the study unravels motivations driving policy choices and expands the theoretical understanding of EU-Azerbaijan policy transfer in the VET sphere. Findings reveal a dynamic process where both global and national forces interact. While the EU-inspired VET model initially gained legitimacy as a solution to domestic challenges, local actors strategically adapted mechanisms to suit their political and economic interests. Key factors influencing the reform process include human capital deficiencies, skills shortages, centralised governance structures, and a negative perception of the Soviet legacy. The EU's role was significant in problematizing VET underdevelopment, proposing solutions, and catalysing the implementation process. This dissertation enriches the scholarly discourse on VET policy adoption by demonstrating the intertwined nature of global and national forces in reforms. It addresses a gap in the literature by elucidating the historical context shaping post-Soviet VET transformations outside the EU. The findings contribute to theoretical debates on policy transfer within the VET sector, offering insights into policymakers' motivations, contextual influences, and the complexities of translating global models to localised settings.

List of Abbreviations

| | |
|---------|--|
| AzNQF | Azerbaijan National Qualifications Framework |
| BTC | Baku-Tbilisi-Ceyhan oil export pipeline |
| CPE | Cultural Political Economy |
| CWEC | Common World Educational Culture concept |
| ETF | European Training Foundation |
| EU | European Union |
| GDP | Gross Domestic Product |
| GSAE | Globally Structured Agenda for Education theory |
| ILO | International Labour Organization |
| IMF | International Monetary Fund |
| IO | International Organization |
| MoE | Ministry of Education |
| MOLSPSP | Ministry of Labour and Social Protection |
| NES | National Employment Strategy |
| NQF | National Qualifications Framework |
| OECD | Organisation for Economic Cooperation and Development |
| PISA | Programme for International Student Assessment |
| PPP | Public Private Partnership |
| SDGs | Sustainable Development Goals |
| SPPRED | State Program on Poverty Reduction and Economic Development |
| TVET | Technical and Vocational Education and Training |
| UNDP | United Nations Development Program |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |
| UNEVOC | International Centre for Technical and Vocational Education and Training |
| UNICEF | United Nations Children's Fund |
| USSR | the Union of Soviet Socialist Republics |
| VET | Vocational Education and Training |
| SOCAR | The State Oil Company of the Republic of Azerbaijan |

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Author's declaration

I confirm that the content of this dissertation is solely my own creation, except for any acknowledged contributions from others. This work is original and has not been submitted for a degree at the University of Glasgow or any other institution.

Printed Name: MAJID BAYRAMLI

Signature:

CHAPTER 1: INTRODUCTION

1.1 Background

In recent decades, the role of VET has changed significantly due to globalisation and important socio-economic events such as economic downturns and financial crises. In the face of growing globalisation and intense competition, which push countries to pursue economic development, the importance of human capital has increased significantly as a crucial factor in promoting this development (Zajda, 2018). Within this framework, prominent international organisations such as UNESCO, the EU, the World Bank, ILO, and OECD have acknowledged VET as a crucial instrument for cultivating human resources and tackling structural issues such as unemployment, social disparity, poverty, and restricted societal mobility (Melnyk, 2023). In this realm, the policies and guidelines of International Organizations (IOs) have had a tremendous impact on educational frameworks, especially in developing countries and transitional economies (Ashton et al., 2005; Gilbert & Vines, 2006; Grek, 2010; Edwards et al., 2023).

Given that VET policymaking is influenced by a country's socio-economic and cultural context, the existing literature on this subject goes beyond conventional education-focused research and adopts a multidisciplinary perspective (Verger & Fontdevila, 2023, p. 3). This approach enables a detailed examination of complex social and institutional dynamics. The literature on the impact of international organisations on education policies in developing countries often explores topics such as policy transfer and borrowing (Steiner-Khamsi, 2014, 2021), convergence and divergence (Green, 1999), and the concept of Europeanisation in the context of the European Union and its neighbouring states (Fligstein, 2000; Börzel & Risse, 2012).

Although policy transfer is a modern focus of education research, the topic includes significant debates that are also the subject of this study. Hence, some neo-institutionalist scholars stimulated by the World Culture Theory argue that national-level politicians are influenced by international entities such as the World Bank or the EU in their policy decisions. They claim that these politicians adopt and implement policies from these entities to gain legitimacy on the global stage (Ramirez et al., 2016). Essentially, these researchers propose that national policy-making is progressively influenced by a need to comply with global norms and standards. This is because adhering to these international benchmarks is seen as improving a nation's reputation and credibility on the global platform. However,

extensive research on the impact of globalisation on education policies indicates that economic issues, rather than culture, are the most critical considerations in policy borrowing. The notion of the Globally Structured Agenda for Education (GSAE) claims that the international political economy, which drives globalisation, also influences social policy in nation-states (Dale, 2000). These academics closely examine the changing intricacies of the global capitalist economy and evaluate its impact on educational systems, including at the level of national implementation (Dale, 2000; Verger, Novelli, et al., 2018). On the other hand, some scholars believe that national policy decisions are mainly influenced by internal factors and local concerns. They argue that the impact of global institutions such as the World Bank or the EU is either exaggerated or varies depending on the specific socio-political and economic conditions of each country (Börzel & Pamuk, 2012; Börzel & Risse, 2012; Ademmer & Börzel, 2013; Börzel, 2015).

This research investigates policy change in Azerbaijan's VET system, using it as a case study and drawing on previous research in the field. The VET reforms in Azerbaijan, which began after 2012 and were strongly influenced by the European Union, reached their culmination in 2018 with the adoption of the Law on Vocational Education (European Training Foundation, 2020). This legislation represents a substantial policy change, with the implicit intent to move away from conventional, centrally regulated models to a system that is adaptable to the changing needs of the labour market. This study explores the process of policy adoption in Azerbaijan's VET reform. It specifically examines how policy ideas from the European Union were transferred and incorporated into the national context. In the following chapters, a more thorough examination is conducted on the debated paths of policy ideas. This analysis focuses on how external factors, including those from the European Union and other international organisations, influenced the decisions in the field of VET policy change in Azerbaijan. This research specifically examined different theories that were indicated above and others in the field to clarify the conditions that drive policy change and the elements that have caused or impacted specific decisions in the process of policy change. This investigation provides insight into the complex and diverse nature of VET policy-making and change in a globalised environment.



Figure 1 Policy change in the VET sector of Azerbaijan. (Author-created)

Thus, in the backdrop of sweeping global trends and policy influences, this research delves into the policy change within Azerbaijan's VET system, particularly post-2012 reforms leading to the 2018 Law on Vocational Education. These changes signify a deliberate shift from the Soviet-era models towards a system synchronised with European standards. The Venn diagram included above (see Figure 1) herein illustrates the intersection of the 'Old Soviet' educational legacy with the 'New European' influences and the existing 'Status quo' of Azerbaijan's VET landscape on the eve of reform. This graphical representation serves as a conceptual guide for the analysis, shedding light on how policy reforms embody the synthesis of historical legacies and modern European practices. By examining the blend of New European and Old Soviet paradigms, the study navigates through the layers of VET policy development, underscoring the complex interplay between internal dynamics and external pressures in a globalised educational context.

1.2 Rationale

The rationale for this study emerges from several key considerations that underscore its importance and value. Firstly, by exploring the influence of international organizations in education policy, the study provides a deeper understanding of the extent to which international organizations, particularly in

the context of VET, can influence the education policies of nation-states. This exploration is vital in a globalised educational landscape where international norms and standards increasingly influence local education systems (Zapp, 2021). The study engages with discussions on whether international influence leads to the homogenization of education systems globally or whether local contexts lead to divergent educational practices and policies (Käpplinger, 2011). It further explores the role of international organizations in setting education agendas (Verger, Novelli, et al., 2018) and situates its analysis within the broader framework of globalization and its impact on education by investigating how global economic and cultural flows are influencing national education policies (Robertson & Dale, 2015).

Moreover, this research delves into the debated role of VET as a catalyst for economic development in developing countries, a topic that has garnered considerable attention in VET literature (Valiente, Capsada-Munsech, et al., 2020; Wolf, 2020). Notably, governments in developing countries grapple with numerous structural challenges requiring immediate action (Kingombe, 2012; Melnyk, 2023). Specifically, this study focuses on the Azerbaijani government's rationale behind reforming its VET system. It seeks to determine whether the VET system is perceived primarily as an instrument for economic development or if it serves other utility functions within the context of Azerbaijan. By scrutinizing the problems that the Azerbaijani government intends to address through its VET system, this research aims to shed light on the evolving role of VET. Furthermore, it contrasts the function of VET in developing countries with the vision articulated by international organizations, such as the European Union, thereby contributing to a broader understanding of VET's multifaceted role in different socio-economic settings.

This study is also motivated by a gap in traditional policy transfer research, which predominantly centres on the diffusion of specific policy mechanisms or so-called "global education policy" by international organizations or the adoption of these mechanisms by nation-states (Maurer & Gonon, 2014; Šćepanović & Martín Artiles, 2020). However, this research seeks to expand the scope of policy transfer literature. Instead of focusing solely on the transfer of specific models like the German dual system, the British apprenticeship model or the National Qualifications Framework, it aims to explore the transfer of broader policy ideas that contribute to the restructuring of the entire VET system. By shifting the focus

from individual policy mechanisms to the overarching conceptual transfer of policy ideas, this study offers a novel perspective on how countries, particularly those in transition, reconfigure their VET systems influenced by global policy ideas and practices.

Furthermore, this study not only examines the influence of international organizations on nation-states but also seeks to address a specific gap by focusing on the European Union, a supranational organization with a historically limited mandate in education (John, 2018; Witt, 2018). This approach is particularly relevant given the evolving role of the EU, especially in light of historical shifts. The impetus for this research stems from the scarcity of studies on the EU's involvement in shaping vocational education policies in its neighbouring regions. Specifically, there is a dearth of research on the EU's role in Eastern neighbourhood countries, which have transitioned from centrally planned communist systems to 'state-controlled' market economies, as in the case of Azerbaijan. This research aims to shed light on the EU's influence in these contexts, offering insights into its impact on the formulation and adaptation of vocational education strategies.

Finally, it is acknowledged that the collapse of the USSR, once home to one of the world's most robust VET systems, left many of its former states and even other former communist countries with devastated VET foundations (West, 2013). The dissolution of the USSR not only disrupted the economic models but also dismantled key components of the VET systems, leading many of these transitioning countries to question the viability and role of VET within their new contexts (Anopchenko et al., 2018). Despite the significant impact of this transition, there has been limited research examining the evolution of VET systems alongside the shift from communist to market economies, particularly in countries that gained independence post-1991 and were part of the former USSR. This study, using the case of Azerbaijan aims to illuminate the experiences of these transitioning nations, focusing on how governments navigated and reformed their VET systems in the aftermath of such a fundamental societal and economic transformation.

1.3 Problem Statement

Although the comprehensive literature review on the topic is presented in the following chapter, it is evident that the research on the policy change in the field of VET in the EU neighbourhood countries is limited, which is particularly noticeable in post-Soviet contexts. Although the significant influence of the EU on

the former Soviet Republic of Azerbaijan's 2018 VET reforms marks a critical point in the country's VET evolution, there is a notable lack of in-depth research on the complexity and nature of this influence, especially within transitioning from old Soviet educational paradigms to new models that are perceived as motor for tackling diverse socio-economic problems (Silova & Wiseman, 2010; Serban, 2011; King & Lulle, 2016).

The problem manifests in two key dimensions: Firstly, there is a scarcity of exploration into how and why the European Union aims to influence and shape its member and also neighbourhood countries, especially its so-called "Eastern Neighbourhood"¹. This gap hinders a comprehensive understanding of the EU's policy influence dynamics, complicating the alignment of local educational policies with EU standards and potentially leading to the adoption of policies that may not suit local needs or priorities (Bartlett & Pagliarello, 2016). Secondly, while the existing literature often focuses on the EU's impact within its member states (Scheuch et al., 2021), its influence in non-member states, especially in critical sectors like VET, is not as thoroughly explored. This oversight restricts our understanding of the complexities and challenges faced by transitional and developing economies undergoing educational policy reforms (Robertson & Dale, 2008; Verger, Novelli, et al., 2018). This lack of a deeper understanding of the nuances as mentioned earlier, including the interplay between international factors and local influences in the formation of education policies, requires a broader discussion of global educational trends and their adaptation at the national level.

Therefore, this study aims to address the "problematique" that lies at the intersection of understanding the evolving role of VET in economic development, policy transfer dynamics, the influence of international organizations like the EU, and the specific challenges faced by post-Soviet states in reforming their VET systems during a period of significant transition. By focusing on Azerbaijan's VET system, this research endeavours to contribute significantly to the discourse on VET policy transfer, particularly in contexts transitioning from Soviet-era educational frameworks to contemporary Western models. It seeks to enrich the scholarly conversation about the integration of global influences and local

¹ commonly refers to a group of six non-EU countries covered by the European Union's European Neighbourhood Policy (ENP). These countries are: Armenia Azerbaijan Belarus Georgia Moldova Ukraine

educational needs, offering valuable insights into educational reform processes in diverse geopolitical environments.

1.4 Purpose of the Study

Thus, this study aims to provide a detailed analysis of the European Union's influence on Azerbaijan's VET reforms and subsequent policy change with the adoption of the Law on Vocational Education. Focusing on policy transfer and adoption in the case of Azerbaijan, it seeks to understand the intricacies of how global ideas in VET were generated, how the EU institutionalised these ideas, how and why these ideas were transferred or borrowed by local policymakers and how they recontextualised during policy change phase. Hence, the research revolves around the following key research questions:

Aiming to understand the degree of the EU's influence on Azerbaijan's VET reforms, the main research question is: ***To what extent has the European Union influenced the VET reforms in Azerbaijan?*** This is the general research question that aims to explore the depth and scope of the EU's impact on Azerbaijan's VET reforms, including the influence of EU policy ideas and the adoption of EU VET standards during the policy change process.

Aiming at understanding the main reasons and motivations behind the decisions and unpacking the interplay of local and global factors that led to certain reform trajectories, the complementary research question is: ***What interplay of local and global factors, including material and ideational drivers, determined the trajectory of these reforms?*** This question seeks to understand the dynamic interaction between Azerbaijan's local conditions and EU global influences in shaping the reform process.

To dissect and analyse the envisaged configuration of the VET system in Azerbaijan post-reform, concentrating on the specific ideas and mechanisms that were either adopted or discarded during the policy adoption cycle, the additional research question of this inquiry in the research is: ***What specific VET mechanisms were proposed for introduction in the Law on Vocational Education, which of these were ultimately integrated into or excluded from the policy, and what were the reasons for these decisions?*** This question delves into the detailed examination of the tools and mechanisms within the context of the overarching VET paradigm envisioned by the government as a consequence of policy change. Additionally, the research seeks to discern the instruments through which the government intended to manage its VET policy, to what extent the European Union

influenced these tools, and whether they were embraced or disregarded by the Azerbaijani government.

Through addressing these research questions, this study's discussion chapter bridges theoretical gaps identified in the rationale and literature review, specifically by exploring the multifaceted ways in which the European Union influences Azerbaijan's VET reforms. It intends to clarify the mechanisms of policy borrowing and adaptation within Azerbaijan's unique historical, geopolitical and educational context. It also aims to understand the decisions and factors that influenced those decisions. The insights from this research are anticipated to offer perspectives that could inform the academic discourse on policy transfer and adaptation in transitional and post-Soviet contexts. While the study is primarily focused on Azerbaijan's VET system, its findings may be of interest to researchers and policymakers in similar post-Soviet settings seeking to understand the complexities of aligning national education policies with international influences.

1.5 Overview of Chapters

This thesis is structured into eight comprehensive chapters, each detailing a distinct aspect of the research concerning the VET reforms in Azerbaijan and the influence of the European Union on the policy change. Below is a brief overview of what each chapter entails:

1. **Introduction:** This chapter sets the perspective for the study, outlining its significance in the multidisciplinary VET policy study. It identifies the background for the study and introduces the research questions and purposes, laying the foundation for the subsequent analysis.
2. **Evolution of the EU's role in education systems:** The chapter is about the evolution of the European Union's Vocational Education initiatives. It explores how the EU's policies and strategies have shaped VET across member states and beyond. The chapter delves into VET's historical roots and dynamic evolution within Europe, underpinned by the EU's institutional frameworks, and how these elements have collectively influenced the VET landscape.
3. **Context - Azerbaijan's VET System before the reform:** This chapter provides an in-depth look at the history and development of Azerbaijan's VET system up until the EU's involvement in the VET system. It explores the system's origins, the evolution of its structure and policies, and the socio-

political factors that have influenced its progression. This historical context sets the scene for the reform process and illustrates the snapshot of the situation in the country before the EU's involvement in the reform of the VET system in Azerbaijan.

4. **Literature Review:** This chapter delves into the existing literature on the influence of international organizations in VET policies globally and explores the mechanisms and tools these organizations use to exert influence, as well as the conceptual and theoretical frameworks that explain the process and motivations behind policy transfer and adoption. The chapter highlights key global players in education and VET policies and discusses the mechanisms through which international organizations impact policies in countries.
5. **Conceptual Framework:** This chapter introduces the theoretical frameworks underpinning the study, primarily focusing on the Cultural Political Economy (CPE) and the Historical Institutional perspectives. It explains how these concepts help in understanding policy change processes and the dynamics of policy transfer, providing a theoretical lens through which the study's findings are analysed.
6. **Methodology:** This chapter outlines the qualitative research methodology, detailing process-tracing case study design, data collection methods based on documents and interviews, and analytical approaches adopted to analyse the data. It discusses the strategies employed to ensure the research's validity and reliability, setting the stage for the empirical investigation.
7. **Findings:** This chapter presents the core findings of the research. It explores the economic, political, and institutional challenges encountered during Azerbaijan's VET reform process and analyses global-local and material and ideational factors that led to certain decisions in the stages of policy adoption. Based on data analyses, the roles of various actors and institutions in these processes are examined in detail in this chapter.
8. **Discussion:** In this chapter, the research questions are answered based on findings within the frameworks of CPE and Historical Institutionalism. The

chapter discusses how the findings bridge the gaps in the literature and analyses the findings based on major debates in the field.

9. **Conclusion and Implications:** The final chapter summarises the key insights and contributions of the research. The chapter addresses the implications for both theory and practice. It acknowledges the limitations of the study and proposes future research directions, emphasizing the need for a broader conceptualization of VET policy, especially in developing countries with unique challenges.

The subsequent chapters have been systematically organised to provide a coherent presentation of the research's scope, findings, and implications.

CHAPTER 2: EVOLUTION OF EU'S VOCATIONAL EDUCATION INITIATIVES

2.1 Introduction

This chapter serves as an exploration of how the EU's policies and strategies have shaped VET across member states and beyond. Following an introductory chapter that sets the stage for the study, this chapter delves into the historical roots and dynamic evolution of VET within Europe, underpinned by the EU's institutional frameworks, and how these elements have collectively influenced the VET landscape. It provides a critical examination of the EU's role in fostering harmonization, enhancing skills, and addressing labour market demands through VET policies. This inquiry bridges the foundational context provided in Chapter 1, situating the EU's influence within a global context of educational reform and policy transfer and setting the groundwork for a comprehensive understanding of international influences on national VET systems.

2.2 Origins of the EU's VET Initiatives

Although vocational education has always emerged on the porous border between education and the labour market, with a commitment to both, its character and purpose have changed throughout history (Witt, 2018). One of the oldest descriptions of the concept of vocational education and training is 'technical instruction', which encompasses hand training, as opposed to mind education (Moodie, 2002). Whereas few today would promote such a simple duality, many vocational education conceptions indirectly contain other mind/body differences, such as the separation between knowing and doing, theory and practice (Magnus, 1888; Gonczi, 1997). UNESCO now defines vocational education as the "education that is designed for learners to acquire the knowledge, skills and competencies specific to a particular occupation or trade or class of occupations or trades" (UNESCO, 2024). Historically, VET in Europe has been assigned the task of meeting local workforce training needs through a variety of apprenticeship approaches. However, Recent policy changes in Europe and beyond demonstrate a significant transnational shift in VET policy, moving away from its traditional focus on localised labour market needs and towards integration within the global lifelong learning sphere (Witt, 2018).

2.2.1 Early Beginnings: Emphasizing Vocational Training in European Continent

The roots of European education lie in an age-old tussle between the intellectual endeavours of academic scholarship and the tangible results of vocational

training. In ancient Greece, for instance, there was a clear demarcation between the revered philosophical discourses that took place in the academies and the bustling workshops where craftspeople enhanced their skills. While Plato and Aristotle contemplated the metaphysical, artisans were grounded in the physical crafting tools, textiles, and pottery essential to daily life (Lewis, 1995; Wollschlager & Fries Guggenheim, 2004).

This dichotomy between "mind" and "hand" was not just limited to ancient Greece. Across medieval Europe, the intellectual pursuits of the clergy and scholars were held in stark contrast to the hands-on training of craftsmen (Rosser, 1997). Universities like the University of Bologna or the University of Paris became epicentres of theological and philosophical musings, while the streets echoed with the sounds of blacksmiths, carpenters, and masons.

The Middle Ages saw the emergence of guilds, which played a pivotal role in shaping the vocational education landscape. Guilds were medieval associations of artisans and merchants that regulated the practice and trade of their crafts within specific towns. They set standards, established training processes, and ensured quality. Apprentices would enter into contracts with master craftsmen, embarking on years of training before they could achieve the status of a journeyman and, eventually, a master of the craft themselves (Wollschlager & Fries Guggenheim, 2004). These guilds became the guardians of trade secrets and techniques. They were not merely about economic interests but were also custodians of the quality and traditions of craftsmanship. The legacy of guilds is still palpable in modern apprenticeship systems, especially in countries like Germany, where the "dual system"² of apprenticeship has its roots in these medieval associations.

Nevertheless, as essential as these guilds were, they also inadvertently deepened the chasm between academic knowledge and vocational skills. The universities expanded their curricula, delving deeper into subjects like medicine, law, and the arts. In contrast, the guilds retained a laser focus on skill perfection, often sidelining broader educational pursuits. This divergence set the stage for the debate on the value of academic versus vocational education - a debate that continues to resonate even today (Berner & Gonon, 2016). As Europe transitioned from the Middle Ages to the Renaissance and then to the Enlightenment, there were increasing calls for a more integrated approach to education. The

² system of VET that combines apprenticeships in companies with vocational schooling, providing both practical work experience and theoretical education within a regulated framework.

Renaissance man, epitomised by figures like Leonardo da Vinci, was not just a scholar but also an engineer, an artist, and an inventor. This era hinted at the potential synergies between academic pursuits and vocational expertise (Koestler-Grack, 2005). However, the real push towards bridging the gap came with the Industrial Revolution (Grubb, 2006, p. 12). As industries burgeoned, there was a pressing demand for skilled labour that could not only operate machines but also understand the underlying principles. This required an education system that merged the theoretical with the practical, paving the way for the modern VET systems with apprenticeship models tailored to specific local needs.

2.2.2 Establishment of the European Union and institutionalization of vocational education

The European Union, in its quest for economic and social cohesion, has recognised the value of a skilled and adaptable workforce. From the Treaty of Rome³ to the Maastricht Treaty of 1992 and beyond, VET has been an area of interest, if not always explicit competencies, in the Union. The inception of the European Community was a pivotal moment for vocational education. Foundational agreements like the 1951 accord that birthed the European Coal and Steel Community and the Treaty of Rome explicitly stated the need for a unified strategy on vocational training (European Union, 1957). The Treaty of Rome, while primarily an economic treaty, provided the first hints of what would become a broader education policy. It emphasised the need for vocational training to ensure the mobility of workers within the common market. This marked the beginning of the EU's role in VET, albeit in a limited and economic-centric context.

To realise its objectives in VET, the EU has developed an institutional framework with two leading agencies active in the field. European Centre for the Development of Vocational Training (CEDEFOP), established in 1975, supports the development of European VET policies and contributes to their implementation (European Council, 1975). It acts as a bridge between policymakers and practitioners. European Training Foundation (ETF) was founded in 1990 with the mission to assist non-EU countries in reforming their VET systems in line with the EU's broader external relations policies (European Council, 1990). Additionally, The European Quality Assurance in Vocational Education and Training (EQAVET), established in 2009, came into existence against the backdrop of the Copenhagen

³ March 25, 1957, for the Treaty establishing the European Economic Community (EEC)

Process. This process was initiated in 2002 with an emphasis on enhanced European cooperation in VET. Quality assurance emerged as a key theme, culminating in the 2009 EQAVET Recommendation adopted by the European Parliament and the Council (Ante, 2016a). The goal was to provide a systematic way to guarantee quality and drive improvement in VET systems, promoting consistency throughout Member States.

It is essential to recognise that apart from these two agencies, the EU functions through a complex governance structure involving multiple agencies, actors, and stakeholders, making the policy process multifaceted and dynamic. This complexity is due to the EU's nature as a hybrid entity that is both supranational and intergovernmental, while also wielding significant regulatory authority that impacts numerous sectors extensively (Klatt, 2014). Nevertheless, EU policymaking was not shaped to follow a simple two-level structure but instead brings together a diverse range of public and private actors from various countries and sectors to collaborate and build consensus on policy directions (Richardson & Mazey, 2015). This collaborative approach is further complicated by the shifting dynamics of member states' interests and broader EU objectives, which often intersect in various policy sectors, including education, vocational training, and external relations (Sweeney, 2023).

In particular, the European Council, the highest political body in the EU, is responsible for setting the overall direction of the Union's policies. Composed of the heads of state or government of the member states and the President of the European Commission, the European Council plays a critical role in initiating policy discussions and resolving issues that cannot be addressed at lower levels. The Council of Ministers, often referred to as the Council of the European Union consists of ministers from member states responsible for specific policy areas, such as education, which is shaped by the Education Council. Both the European Council and the Council of Ministers function through a blend of intergovernmental and supranational processes, with decisions made through a mix of consensus and qualified majority voting (Sweeney, 2023). The European Commission, as the executive arm, initiates policies and oversees their implementation, while the European Parliament—the only directly elected body—works alongside the Council to co-legislate. Together, these institutions form a complex web of decision-making, where policies are not only shaped by member state interests but also by

the Commission's agenda-setting power and the Parliament's increasing influence (Peterson & Shackleton, 2012).

Nevertheless, at the central level, the European Council, comprising heads of state or government of EU countries, provides the political direction and has been instrumental in endorsing and supporting major VET strategies. In the context of education and vocational training, these institutions collaborate closely, with the European Commission driving initiatives like the Skills Agenda for Europe 2023⁴ and the European Qualifications Framework. The Commission also plays a pivotal role in the EU's external relations, promoting policy transfer and capacity building in European Neighbourhood Policy (ENP) countries such as Azerbaijan, often in collaboration with other bodies like ETF (Börzel & Lebanidze, 2017). While the Council of Ministers ensures the coordination of national education policies with EU strategies, the European Parliament exercises democratic oversight, influencing the legislative process and ensuring that policy initiatives reflect broader social and economic goals. The resulting policies are typically enacted through directives, which allow for flexibility in implementation across different member states, and regulations, which have binding effects across the Union without needing national approval (Sweeney, 2023). The trilogue process, which involves negotiations between the Parliament, Council, and Commission, further highlights the collaborative nature of EU policymaking, where consensus-building is key to advancing legislation (Shackleton, 2012)

Thus, at the turn of the millennium, the EU member countries saw intensified involvement of the organization in education. As indicated above, the Lisbon Strategy of 2000 laid the groundwork for enhanced cooperation in education and training, setting a trajectory for the development of EU-wide policies in this sector (Beukel, 2001; Hingel, 2001; Lawn & Lingard, 2002).

2.2.3 Transnational Shifts: Globalization and crises management

The latter part of the 20th century and the early decades of the 21st century have witnessed dramatic shifts in the vocational education and training domains within the European Union. Central to these shifts has been the inexorable march of globalization, which has woven a complex web of interconnectedness, reshaping

⁴ The Skills Agenda for Europe is overarching strategy developed by European Council since 2016 guides various initiatives related to skills development, including VET.

economies, societies, and education systems in its wake (Brown et al., 2008). As European countries found themselves deeply embedded in this global tapestry, their educational and training needs evolved, setting the stage for a recalibrated VET landscape. The European Union recognised that VET couldn't be siloed within national confines; they needed to resonate on a transnational scale. It wasn't just about ensuring that a technician from Spain could seamlessly work in Sweden; it was about constructing a policy framework that could holistically address the fluidity of modern labour markets (Busemeyer & Trampusch, 2012).

The Treaty on the European Union or the Maastricht Treaty of 1992, was a turning point. While it maintained that education policy was a national responsibility, it introduced a new dimension by promoting cooperation between Member States. The treaty explicitly stated the EU's role in supporting and supplementing the actions of Member States around vocational training. The Lisbon Strategy of 2000 additionally set an ambitious goal for the EU - to become the world's most competitive and dynamic knowledge-based economy by 2010 (European Union, 2007). This goal brought VET into sharp focus because it also stipulated that the Union develop "a vocational training policy" to achieve that goal (European Union, 2007). The strategy acknowledged the essential role of education and training in achieving economic goals, driving the need for a more coordinated and comprehensive EU-wide approach to VET.

Since the Treaty of Lisbon, the subject of modernizing education systems by enhancing their responsiveness to labour market demands to achieve the knowledge economy has been at the forefront of the political agenda (Nagel & Knodel, 2009). The new domain of European education policy has progressively emerged, with more and more policy entrepreneurs from nation-states engaging, creating an overall goal and method of working in the domain of education policy. This advancement was encouraged by the utilization of the 'Management by Objectives' system, where the framework of objectives, shared benchmarks and indicators, and standard quality norms are set by the EU that most academics argue may be considered a key component of the new Europeanisation idea (Lawn & Lingard, 2002; Nóvoa & Lawn, 2002; Lawn & Grek, 2012).

Thus, Europeanisation has morphed into a multifaceted concept that refers to the transmission of EU norms, policies, and practices into the domestic structures of both member and non-member states. Defined as the "construction, diffusion, and institutionalisation of formal and informal rules, procedures, policy paradigms,

and shared beliefs" (Radaelli, 2003, p. 30), it encompasses the adaptation of national policies to align with EU governance structures. It reflected a process that not only changes policy but also affects domestic political arrangements and the interactions among policy actors. This dynamic could be observed both as a top-down process, where EU-level decisions influence national policies and as a bottom-up process, where member state preferences shape EU policies, resulting in a reciprocal and co-evolutionary relationship between the domestic and EU policy landscapes (Klatt, 2014). Scholars also highlight the horizontal dimension of Europeanisation, where member states exchange ideas and policies through cooperative mechanisms provided by the EU, promoting harmonisation and a shared policy culture (Mikulec, 2017).

Consequently, the Europeanisation of education policy became an important example of the process, occurring at the national level through what scholars refer to as "national adaptation" which entails a process of changes in domestic policies as a result of participation in EU decision-making processes (Sorensen & Eeva, 2024). As an influence of Europeanisation after the 2000s education policies in member states were often reoriented to align with EU frameworks like the European Qualifications Framework, developed under the Open Method of Coordination (OMC), which uses soft law to guide national reforms without imposing legally binding obligations (Elken, 2015; Sorensen & Eeva, 2024). In the case of post-Soviet and Eastern European countries, Europeanisation presented a unique set of challenges and opportunities where countries often experienced selective Europeanisation, adopting EU norms in certain policy areas while resisting others due to their historical, political, and economic ties to Russia (Korosteleva et al., 2013). The horizontal dimension of Europeanisation, particularly the exchange of ideas and policies between EU member states and non-member states, further illustrates the complexity of the process, as cooperation fosters convergence in some areas while divergence persists in others. The development and implementation of the EQF serve as a prime example of how Europeanisation affects both policy processes and outcomes, guiding national reforms through cooperative networks and common EU-level goals (Mikulec, 2017). In this regard, before the COVID-19 pandemic of 2020, the global financial crisis of 2008, which resulted in the sovereign debt crisis and the global economy's standstill, was a significant milestone for reforming VET policy in Europe. The European economy was severely damaged as a result of the crises, and several governments were forced to the verge of collapse in the years that followed. The

young unemployment rate hit an all-time high of 23% in 2012, and the EU warned of a widening skills gap, stating that over two million posts could not be filled (Volles, 2016). In most of the cases, the craftsmen, operators, and elementary occupations were impacted the most. According to the European Commission, the period between early 2008 and 2011 saw the most significant decrease in job placements for 'craft and related trades' workers, as well as 'operators and assemblers.' This trend worsened the following year, extending into the sizeable 'elementary occupations' group, demonstrating the economic downturn's disproportionate impact on certain sectors (European Commission, 2012). Further fiscal policies have resulted in substantial cutbacks to education expenditures across the EU. However, scholars claim that the crisis has opened up a vast window of opportunity for policy entrepreneurs to market the reform of VET policy in line with a neoliberal approach to education (Borg & Mayo, 2008; Jakobi, 2009). In this context, one of the new policy instruments was the development of a European Qualifications Framework (EQF) for lifelong learning, which aimed mainly at facilitating the mobility of employees and students within the EU (European Parliament, 2008). As a symbol of convergence in EU VET policy, the EQF would become a fundamental mechanism for VET, with the goal of reforming VET systems to make them comparable across national languages and systems; a very challenging task considering the historical divergence in systems and institutions throughout Europe (Zarifis & Gravani, 2013).

Emerging from this realization were definitive characteristics of the EU's VET policy. Firstly, there was a clear drive towards harmonization and standardization. This push wasn't solely logistical. It was as much strategic as it was operational. By standardizing qualifications and curricula, the EU sought to foster a workforce that was mobile not just within Europe but was also adaptable to global market needs (Dale, 2005). This was also supported by the transition from traditional vocational training models to a comprehensive Lifelong Learning (LLL) framework. As Europe underwent rapid socio-economic changes in the 20th century, a need

for continuous, adaptable learning emerged (Field, 2006). Far from being just a tool for economic competence, the EU envisioned LLL as a strategy to foster social cohesion, active citizenship, and personal development (Holford et al., 2008; Holford & Milana, 2023). This philosophical evolution was not abrupt but was a

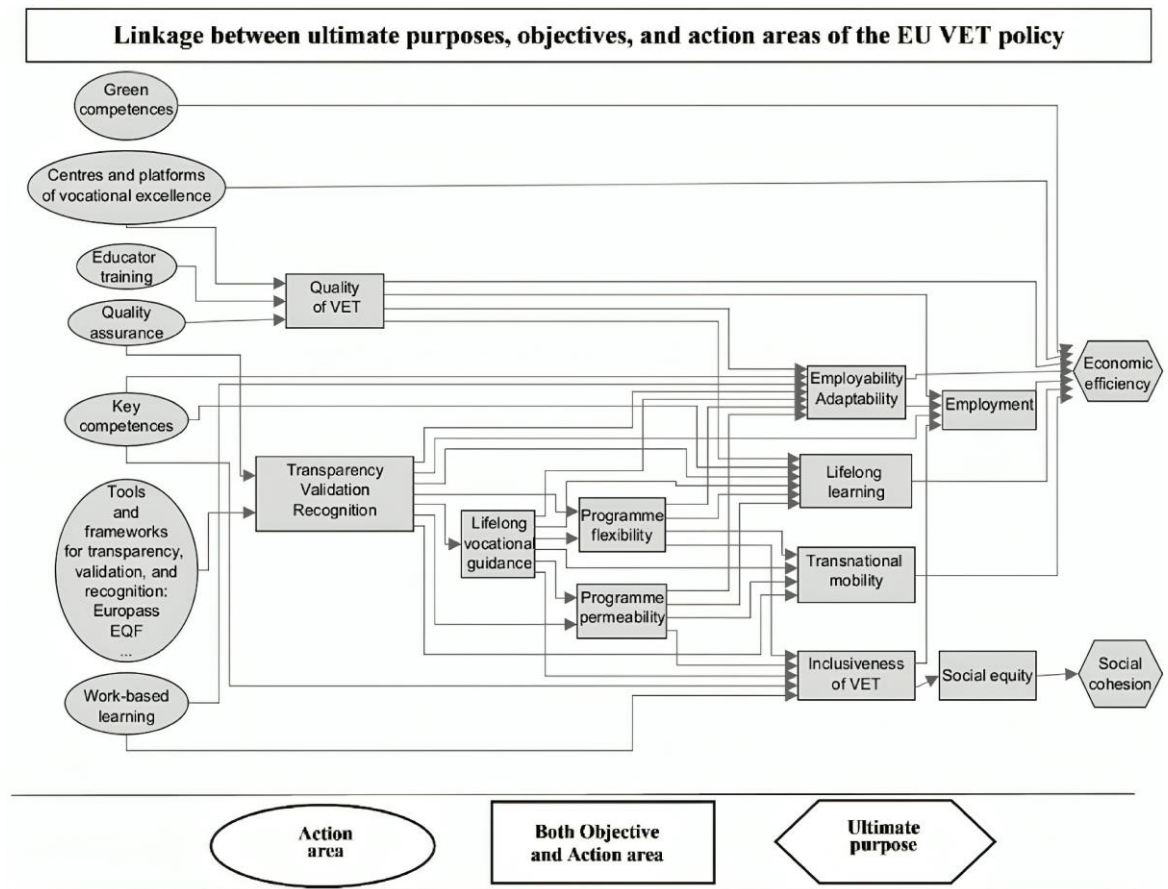


Figure 2 Main features of the EU's VET policy (Tchibozo, 2022)

response to a complex interplay of socio-economic factors, changes in the labour market, and the emerging globalised economy (Jarvis, 2009). Hence, in an age where industries are in everlasting change, curricula that remain static risked uselessness. The EU, recognizing this dynamism, emphasised a VET policy that was not just responsive but also proactive. It cultivated ties between academia and industries, ensuring a feedback loop that kept the curricula relevant. An additional and perhaps most noticeable characteristic of the new paradigm was the EU's promise of inclusivity (Camilleri, 2016). The EU's inclusivity goal in VET access suggests an institutional desire to redirect more individuals towards vocational training. This means positioning VET as a more attractive option than general education at the secondary school level or university education at the tertiary level, thereby enhancing its perception and favourability among potential learners. This wasn't just an economic strategy but a reflection of the EU's vision towards tackling the structural problems it is facing. Such a commitment is

emblematic of the EU's broader ideological stance, seamlessly integrating its economic objectives with its socio-political aspirations (Riddell et al., 2012).

Hence, shaped by the factors mentioned above and challenges, EU-level VET policy initiatives and actions have been conducted to work toward tackling the main problems through certain initiatives. The main initiative was to promote work-based learning in all of its formats, with the aim of enhancing the availability and visibility of apprenticeships while also engaging governments and stakeholders (European Commission, 2013). Countries selected apprenticeships and work-based learning as the priority, however, it should also be acknowledged that Cedefop's research on apprenticeship schemes in 24 EU countries identified a total of 30 relevant apprenticeship schemes across the VET systems (Cedefop, 2018). Overall, Tchibozo, in his article, illustrates the main features of the EU's VET policy in Figure 2 indicated above (2022). It highlights three ultimate goals - transparency, recognition, and lifelong learning - which are achieved through a set of specific objectives like improved VET quality and employability. These objectives are, in turn, reached by implementing various action areas, including initiatives for educator training, work-based learning, and transnational mobility. Hence, a major feature of the EU VET policy is that training is, for a significant part, provided in the workplace, which is also perceived as a factor of employability (Tchibozo, 2022, p. 126).

2.2.4 The EU's Preferred VET Governance Model

An apprenticeship is a specific type of work-based learning which is provided by a structured program that combines on-the-job training with classroom learning (Chankseliani & Anuar, 2019, p. 263). So, cooperation and coordination are required between the state and employers to conduct apprenticeships. Scholars differentiate vocational education and training based on the government's influence on the system (Pilz, 2016). The inherent complexity of VET governance, which necessitates reconciling the diverse interests of employers, educators, and government entities, demands coordination structures. This imperative has prompted scholars to differentiate "dual VET collective skill formation systems" from contrasting models. In statist systems, the state assumes the primary role in the design and delivery of vocational training, typically through publicly funded educational institutions. Conversely, liberal systems prioritise the development of general academic competencies within the formal public education system, with occupational training often occurring outside of this framework and costs shared

between employers and individual employees. Dual VET collective skill formation systems, however, emphasise a collaborative approach where employers, the state, and often trade unions or similar bodies share responsibility for the design, funding, and implementation of VET programs. This aims to ensure a strong alignment between training and evolving labour market needs; thus, the main distinction between VET models in Europe is the utilization of work-based learning or apprenticeship within the VET system.

As indicated above, the three major VET models are the British liberal market model, the French state-regulated bureaucracy model, and the German dual system model (Powell et al., 2012; Green, 2013; Fawcett et al., 2014). The needs of the private market, headed by industries and enterprises, are reflected in the VET system under the liberal market economy model, which relies on private companies to provide on-the-job training and apprenticeship programs voluntarily. Alternatively, national education systems establish, provide, and fund vocational education and training under the state-regulated bureaucratic model, which determines the content of courses in the national curriculum (Sellin, 2002). However, under the state-regulated bureaucratic model, the national government, mostly the Ministry of Education, has the leading role in the education system as the primary supplier of vocational education, which also has a duty to ensure that employees are "qualified" and fulfil state-regulated vocational standards (Greinert, 2004). In the dual system model, a diverse variety of public and private players, including trade unions as well as governmental institutions, are involved in the design, development, and implementation of VET. The dual system, which incorporates the previous two models, offers vocational education at the secondary and postsecondary levels, with a heavy emphasis on apprenticeship and on-the-job training. A collaborative network of public and private middlemen, comprising both government and independent companies, manages the system (Fawcett et al., 2014). The critics of the liberal market model and dual system indicate that apprenticeships are demand-driven and influenced by economic performance and corporations, which means these VET models are highly successful in countries with the high performing economies (Meyer, 2009; Maurer, 2012; Maurer & Gonon, 2014; Ryan & Lőrinc, 2018). In fact, considering the economic difficulties and turbulences in the labour market, providing work-based learning and apprenticeship is an important challenge for the EU member states, as well. Some scholars also indicate that while apprenticeship as a mode of learning may provide national VET systems with greater adaptability to the

needs of individual employers and learners, the educational and training functions of apprenticeships risk being overtaken by the employment function, undermining their value and identity (Rustico et al., 2020). Furthermore, some scholars argue that using VET policies for reskilling and up-skilling adults through training would be feasible if those policies also addressed the issue of motivation, attraction, and retention of people in learning and skills acquisition, which the EU faces significant challenges. People find it challenging to comprehend the proper education and training options for professional transition, as well as to strike a balance between learning and family obligations, due to the quick-shifting advances in technology and the work environment (Psifidou & Ranieri, 2020).

2.3 EU's Influence on VET Policy in the Eastern Europe

The journey of the European Union in endorsing and advocating for VET models, especially to its Eastern European member states, is deeply interwoven with the bloc's broader socio-political and economic objectives (Ante, 2016b). Among the three VET models – the British liberal market model, the French state-regulated bureaucracy model, and the German dual system model – the one that seems to have found favour with the EU, particularly in its outreach to Eastern European states, is a variant of the German dual system (Martínez-Izquierdo & Torres Sánchez, 2022, p. 17). Many Eastern European states, post the Soviet era, underwent significant socio-economic transformations, with a pressing need to align their labour markets with the EU standards (West, 2013). The dual system, with its emphasis on a balance between academic and practical learning, resonated as a potential solution to tackle the rising youth unemployment in these countries and to fill the skills gap in their rapidly transforming economies. The dual system's efficacy in Germany, especially its success in integrating youth into the labour market, has often been touted as a selling point. Meyer (2009) argues that the model's robustness lies in its adaptability to the needs of individual employers and learners. This adaptability, crucial for countries transitioning from socialist to market economies, made the German dual system particularly attractive (West, 2013).

2.3.1 EU's influence on the Baltic States

Following the fall of the Berlin Wall in 1989, the previously communist nations of Eastern Europe joined the European Union in the mid-2000s⁵, some fifteen years after their socialist systems had collapsed. The instance of the Baltic nations (Estonia, Latvia, and Lithuania) is particularly relevant in understanding the EU's attitude to reform initiatives in post-Soviet countries. These nations share a Soviet heritage and have become full EU members, receiving EU guidance and assistance in their efforts to modernise their VET systems (Bünning & Graubner, 2009; Varblane, 2016). It would be interesting to examine the EU's approach to the Baltic nations in terms of reform initiatives and understand the key reform directions in the skills formation system, as well as the primary instruments provided by the EU to achieve these objectives.

It is worth noting that the European Training Foundation (ETF), formed by the EU in 1994, was the primary change agent in post-Soviet and post-communist nations to restructure their VET systems (West, 2013). The ETF oversaw developing and executing aid initiatives, as well as "assisting in the defining of training requirements and priorities" and "disseminating knowledge and encouraging exchanges of experience through publications, meetings, and other relevant ways" (European Council, 1990, p. 4). The ETF also operated through National Observatories, which were formed in each country with its assistance in the mid-1990s. These research centres provided pertinent statistics and cross-country comparisons of VET to inform and influence policy (Bünning & Graubner, 2009). Staff from these organisations were involved in the ETF's country evaluations.

Although the European Commission did not directly supervise the reform of the VET system in the Baltic States, it nevertheless used periodical reports on each country's skill development systems to provide extensive commentary on parts of VET policy that did not appear in the accession conditionality framework for the most part (West, 2013). These assessments also offered similar indications of the direction in which nations' VET practises should grow, which did not differ much across the board. The major goal of the Commission's attempts to guide VET policy in the Baltic States was to ensure that countries implemented a Directive which included recognition of each other's qualifications (West, 2012), which was

⁵ the European Union expanded to include ten new member countries: Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, and Slovenia.

essential for access to labour market opportunities and participation in the Commission's numerous education programmes. This was necessary for preparing countries to participate in the European Employment Strategy, both by implementing specific policies, such as active labour market measures, and by implementing the 'open method of coordination,' which entails a cycle of planning, making public commitments, and opening the countries' policies and practises to external scrutiny (Bünning & Graubner, 2009; West, 2013).

The primary target of the reform of the skills system also included decentralisation of the VET system to the regions, the inclusion of "social partners," and agencies with no ties to central ministries. Thus, the need to link VET more closely to the labour market was emphasised, but rather than using market mechanisms to achieve this, the emphasis was on employer and union involvement in VET governance, as well as systematic adjustment of formal training or occupational standards to the needs of employment (Bünning & Graubner, 2009). The EU also frequently emphasised the necessity to create an adult VET-providing sector that had not existed during the communist era in the Baltic States. This was closely related to the problem of retraining employees who were displaced by economic transformation and to practical initiatives to help the jobless find jobs. In addition, the EU emphasised the importance of qualifications as a crucial component not only of modernization but also of establishing accountability and raising the quality of the VET system. This would include the establishment of a skills recognition system and updating curricula to standards that were explicitly linked to employers' needs (Bünning & Graubner, 2009).

To back the reform efforts of Baltic countries, the EU offered financial assistance, which began in 1991. However, the volume of foreign aid has only significantly increased since 1999, when the EU launched three pre-accession programmes for EU candidate countries: PHARE (known initially as Poland and Hungary: Assistance for Restructuring Their Economies), ISPA (Structural Pre-Accession Instrument), and SAPARD (Special Accession Programme for Agriculture and Rural Development). The Phare assistance programme was one more way that the EU had an impact on the reform of the VET system in Baltic countries. Phare was initially "demand-driven," with project ideas coming directly from the nations themselves, vetted by the Directorate-General for Neighbourhood and Enlargement Negotiations, and supported by the ETF. As a result, the ETF was heavily involved in organising and overseeing the EU's initiatives in the VET area

(West, 2013). The programme, however, changed to being "accession driven" around 1997, which implied that project proposals had to come from approved action plans that had been negotiated as part of the accession process and reflected things that had been identified as crucial to ensuring a smooth transition to EU norms.

After the full membership, the most significant development for the Baltic States was the EU's provision of cohesion policy funds, a component of European structural funds that have since been the primary source of public investment in these countries (Varblane, 2016). Large portions of the public sector investments in the Baltic countries are developed by this tool because the EU's structural funds can be used in a variety of development areas, including education, the labour market, research and development, the information society, the environment, transportation, and regional and local development (Varblane, 2016). Furthermore, in addition to the Cohesion Fund, as part of the structural funding financing came from the European Regional Development Fund (ERDF) and the European Social Fund.

The majority of EU structural funds were allocated in Baltic nations to finance public sector investments, which have led to the development of a large volume of infrastructure. According to experts, the Baltic nations' public investment would have been almost non-existent without EU assistance, particularly during the years of the economic crisis (Varblane, 2016). As a result, the financial support from EU structural funding for the Baltic nations has evolved into a significant stimulus akin to the Marshall Plan for Western Europe after World War II. In contrast, the financing from Baltic state tax revenues mainly were utilised for the wages of personnel, as well as the support of institutional and individual awards. During this time, the three Baltic nations switched the funding of several strategically significant expenditures from their state budgets, from tax revenues received to EU assistance, including research and development, education, and infrastructure (Varblane, 2016).

2.3.2 Eastern Partnership

Contrary to the Baltic states, six post-Soviet nations in Eastern Europe that were excluded from the EU's expansion—Armenia, Azerbaijan, Belarus, Georgia, Moldova, and Ukraine—have gone through various stages of regional development and transformation (Zajackowski, 2017). The importance of the EU's bilateral and

multilateral agreements and the development of strong political and economic ties with these states have been significant for the growth of trade flows and sectoral cooperation for the EU and its member countries (Incaltarau et al., 2022). As a result, the EU strengthened its ties with these post-Soviet republics in its neighbourhood within many EU-led frameworks. Since the Partnership and Cooperation Agreements (PCAs) of the 1990s, and especially with the European Neighbourhood Policy (ENP) in 2004, the EU's institutional structures and policies have served as a benchmark for reform in the region. While the PCAs stress the "approximation" of national laws to EU standards, ENP documents reveal a specific conception of convergence: European neighbours (particularly Eastern and Southern ones) are expected to align unilaterally with the EU model, rather than a process of mutual adaptation between the EU and its neighbours (European Commission, 2004). The ENP was stated "to prevent the emergence of new dividing lines between the enlarged EU and its neighbours and to offer them the chance to participate in various EU activities, through greater political, security, economic and cultural co-operation" (European Commission, 2004, p. 3). However, scholars claim that the policy was designing an "an alternative to enlargement strategy" after ten new members joined the EU in 2004. The strategy centred on the "integration-security spectrum" where the EU was aimed at using socio-economic tools, including education integration, for eliminating the geopolitical risks as a result of the Russian foreign policy (Moga & Alexeev, 2013).

Consequently, in 2009, the Union created a new political tool, the Eastern Partnership (EaP) initiative, dedicated to the "specifics and dynamics" of the former Soviet nations in Eastern Europe (Korosteleva et al., 2013). By transferring Western governance practises, European standards, and legislation, as well as by creating a framework for cooperation across areas, including the economy, society, political institutions, and civil rights and liberties, the EaP aimed to bring these closer to the core of Europe (Korosteleva et al., 2013; Simão, 2013). Although the future of the EaP is currently uncertain due to the war between Russia and Ukraine, the political climate in Europe and because Ukraine, Moldova, and Georgia have been accepted into membership negotiations, and Belarus is subject to sanctions for its support of Russia, it is still important to highlight the development of the EaP historically in order to understand the context of the relationship between the EU and its Eastern neighbours (Crombois, 2023).

Nevertheless, the EU, with its aims at The European Neighbourhood Policy (ENP), seeks to support political, economic, and social reform processes in the following neighbouring countries. To demonstrate their shared commitment to democracy, human rights, rule of law, good governance, market economies, and sustainable development, partner nations and the EU collaborated on an ENP action plan. This plan outlined short- and medium-term goals tailored to each partner nation. Even though each neighbouring country's action plan is unique, they all typically allude to a number of shared activities, such as political discourse, trade-related concerns, and economic and social cooperation (Langbein & Börzel, 2013).

In fact, due to the low degree of their economic ties, the majority of the monies were used to strengthen intra-regional economic cooperation among the Eastern partners (Zajaczkowski, 2017). The agreements on Deep and Comprehensive Free Trade Areas (DCFTA) with Ukraine, Georgia, and the Republic of Moldova as part of Association Agreements (AAs) became the essential vehicle for the development of mutual connections. This popular tool promoted economic integration by strengthening trade relationships and attracting foreign investment. It established a large regional free trade area aligned with WTO guidelines and global agreements. In contrast, to these Eastern partners who did not wish to participate in DCFTA (Azerbaijan was one of them) discussions, the EU provided more flexible mechanisms, such as Agreements on Conformity Assessment and Acceptance (ACAAs), which would provide free circulation of industrial goods in some sectors but instead is very limited in comparison with DCFTA (Zajaczkowski, 2017).

The cooperation went further by the introduction of the “20 Deliverables for 2020: Bringing Tangible Results for Citizens” initiative document that was introduced at the Eastern Partnership Summit, which took place in Brussels on 24 November 2017 (European Council, 2017). Within the initiative, the four key priority areas: Stronger Connectivity, Stronger Society, Stronger Economy and Stronger Governance, were identified, and all parties agreed to focus on achieving 20 deliverables for 2020 that aimed at delivering tangible benefits to the daily lives of citizens across the region. One of the main deliverables was set as “Strengthen investment in young people’s skills, entrepreneurship and employability” within the Stronger Society section (European Council, 2017). By the time of the Brussels summit in 2017, the integration of EaP countries in the area of education was multidimensional, encompassing incorporation into European areas both in higher education as well as vocational education and training. Thus, all the EaP countries

have been members of the European Higher Education Area since 2005 (except Belarus, which joined in 2015), where they declared the willingness to pursue and implement the objectives of the Bologna Process in their systems of higher education. The Bologna Process was created to bring more consistency to higher education systems across Europe, facilitate student and staff movement, make higher education more accessible and inclusive, and make European higher education more competitive globally. As part of the European Higher Education Area, all nations involved committed to establishing a three-cycle higher education system consisting of bachelor's, master's, and doctorate courses, as well as mutual recognition of degrees and a system of learning and teaching quality assurance (The Bologna Process, 2021).

However, the EU's financial support for the reforms in EaP countries started after the fall of the Soviet Union in 1991 when the European Commission created the Technical Assistance to the Commonwealth of Independent States (TACIS) initiative to provide financial assistance to these nations as they transitioned to democracy and a working market economy. The EU later consolidated its aid efforts. From 2007 to 2013, the European Neighbourhood and Partnership Instrument (ENI) replaced the TACIS Programme for nations within the European Neighbourhood Policy (ENP). The ENI, formerly known as the European Neighbourhood and Partnership Instrument (ENPI), served as the primary financial tool for developing, introducing, and implementing EU initiatives within the ENP (Zajackowski, 2017). As indicated in the EU official report, ENI's seven-year budget was set at EUR 15.4 billion, and the EU has given between 741 and 906 million euros to regional initiatives under the EaP from the ENP Instrument for 2014-2020 (European Commission, 2021). It is indicated that ENI support primarily focused on advancing human rights and the rule of law, establishing a deep and sustainable democracy and growing a thriving civil society, fostering sustainable and inclusive growth and economic, social, and territorial development, including progressive integration in the EU internal market, fostering mobility and people-to-people contacts, including student exchanges, civil society, and regional integration (European Commission, 2004).

The EU's technical assistance to neighbouring countries mirrors national social support programs. Both focus on strengthening a state's capacity to achieve internationally defined policy goals. This tool is usually used by international organizations, such as the EU, in regard to developing economies that typically

lack the ability or administrative capacity to execute international policies (Börzel & Risse, 2012). In addition to policy-specific conditions, the EU empowered reform-minded stakeholders through capacity-building initiatives aligned with specific policy agendas. This support could include financial or technical assistance, as well as facilitating lesson drawing by promoting stakeholder involvement in international networks of policy entrepreneurs (Langbein & Wolczuk, 2012).

In the vocational education and training area, the EaP countries were also integrated into the Torino Process, which was conducted by the European Training Foundation (ETF) and started in 2010 (Dorleans, 2011; European Training Foundation, 2012). The Torino Process is one of the main tools of the EU that document the main VET reforms in neighbouring countries. Within the Torino Process (TRP), ETF provides analysis of the VET policies in EaP countries every two years and contributes with an overview of progress made and priorities for the future. The Torino Process uses the EU's framework of best practices to benchmark neighbourhood countries' VET reforms based on data-backed reports that are provided by nation-states but at the same time collected by ETF's channels. Scholars suggest that the Torino Process employs a common "standard-setting" strategy. This strategy, popular among international donor organizations, allows them to influence policy cycles and generate knowledge products that offer recommendations to policymakers (Jakobi, 2009; Fawcett et al., 2014).

Notably, most scholars studying the EaP believe policy changes aligning Eastern neighbouring countries with the EU are most likely in Ukraine, Moldova, and Georgia. They consider Armenia and Azerbaijan the least likely scenarios for convergence (Langbein, 2011; Langbein & Wolczuk, 2012; Langbein & Börzel, 2013). This is typically explained by the fact that Georgia, Ukraine, and Moldova all intend to join the EU and have an asymmetrical, interdependent connection with the EU. In contrast, given Azerbaijan's control over significant energy resources and Belarus' and Armenia's close ties to Russia, relations between the EU and the other three Eastern European republics have been more nuanced towards Russia and the EU (Börzel, 2015).

2.4 Conclusion

This chapter explored the historical development and evolution of the VET system within Europe. It outlines how EU institutional frameworks have shaped the VET

landscape, the EU's role in promoting skills development, harmonization, and alignment with labour market needs, and how the EU approached post-Soviet countries that later became EU members in their VET system reform. Acknowledging the complex nature of EU initiatives, this section indicates how the push for a skilled workforce within a globalised economy has driven the EU's VET agenda and influenced systems across member states. This exploration, including the main elements of EU policy toward Eastern neighbours, sets the groundwork for understanding the dynamics of policy transfer and adaptation within the EU's educational sphere - providing important parallels for examining the EU's approach to policy change in Azerbaijan. The following chapter then turns to Azerbaijan, exploring its education system structure and the specific political, economic, and cultural factors that set the stage for VET system reform before the EU's involvement as a donor.

CHAPTER 3: VET SYSTEM IN AZERBAIJAN, A HISTORICAL OVERVIEW

3.1 Introduction

This chapter is focused on comprehensively mapping out the landscape of the VET system before the involvement of the EU in reforms of the VET system in Azerbaijan. This exploration is essential in understanding its role within the broader context of the country's educational and socio-economic development. The primary focus of this chapter is to set the scene, providing a comprehensive backdrop against which the processes of policy change and the influence of external entities, particularly the European Union, can be more deeply understood and analysed in the later chapters.

This chapter is methodically structured to provide an overview of the VET system, tracing its historical context and evolution. It begins by exploring the early post-independence period, marked by significant challenges that shaped the nation's socio-economic and educational landscape. This section delves into the political and economic upheavals faced by Azerbaijan in the aftermath of the Soviet Union's dissolution, emphasizing their impact on the country's educational infrastructure. The narrative then transitions to discussing the initial efforts towards educational reform, highlighting the role of international organizations in these early stages. This historical backdrop sets the stage for understanding the subsequent development of the VET system.

The latter part of the chapter focuses on the period of development of both the economy and Azerbaijan's VET system, particularly from 2007 to 2012. This section details the State Program for the Development of Technical Vocational Education (2007-2012), an initiative that marked the government's attempt to reform the VET sector. The narrative examines the objectives, implementation, and outcomes of this program, providing insights into the challenges and achievements during this phase. Additionally, the chapter lays the foundation for subsequently exploring the strategic developments post-2012, including the introduction of new educational strategies and the establishment of key institutions, which were instrumental in further shaping the VET system. This structured approach in the chapter not only chronicles the evolution of the VET system but also lays the groundwork for subsequent analyses of policy changes and their drivers.

This chapter aims to set out an overview of the developments in Azerbaijan's VET system, primarily focusing on the period before the European Union's systematic involvement. It traces the key events and policy shifts that have shaped the VET

system from the time of Azerbaijan's independence, leading up to the point of increased EU engagement. By doing so, the chapter lays the groundwork for understanding the state of the VET system before the significant influence of the EU, situating these developments within Azerbaijan's broader educational and socio-economic trajectory. This comprehensive overview is essential for understanding the subsequent analysis of policy change processes, the role of the European Union, and the unique challenges and opportunities faced by Azerbaijan in reforming its VET system. Table 1, as indicated below, outlines the key socio-economic events that influenced the development of the VET system in Azerbaijan.

Table 1 Timeline and Milestones of significant socio-economic events

| Year/Period | Milestone/Event | Description/Details |
|-------------|---|---|
| 1991 | Independence and Economic Shift | The collapse of the USSR and Azerbaijan's independence. The transition from communism to a market economy started. |
| 1991-1994 | War with Armenia and Economic Challenges | The war led to a significant refugee crisis, with many refugees housed in VET school dormitories and buildings. This period also saw the collapse of the economy and hyperinflation, which significantly affected the education system. |
| 1994-2005 | Poverty Alleviation and Early Reforms | Agreements with the IMF and World Bank, poverty reduction state programs, initiation of oil and gas exports, and early education reforms supported by the World Bank. Reduction of education expenditure. |
| 2006-2012 | Economic Growth and Initial VET Strategy | High GDP growth from oil and gas exports increased reliance on the migrant workforce. Launch of the first state program for VET system development amidst the world economic crisis and reduced education expenditure. |
| 2006-2010 | EU-Azerbaijan Cooperation | EU-Azerbaijan Action Plan and EU Eastern Partnership agreement. Collaboration with the European Training Foundation and initiation of the Torino Process in Azerbaijan. |
| 2012-2018 | Strategic Developments in VET | Launch of Azerbaijan 2020: Vision for the Future aimed at diversifying the economy and building human capital, emphasizing VET. Introduction of the New Strategy of Development of Education. Appointment of a |

| | | |
|--|--|--|
| | | <p>new Minister, focusing on industrialization and employer integration in VET.</p> <p>Establishment of the State Agency for Vocational Education and development of the Strategic Roadmap for VET by McKinsey & Company. EU technical assistance for VET development. Enactment of the Law on Vocational Education.</p> |
|--|--|--|

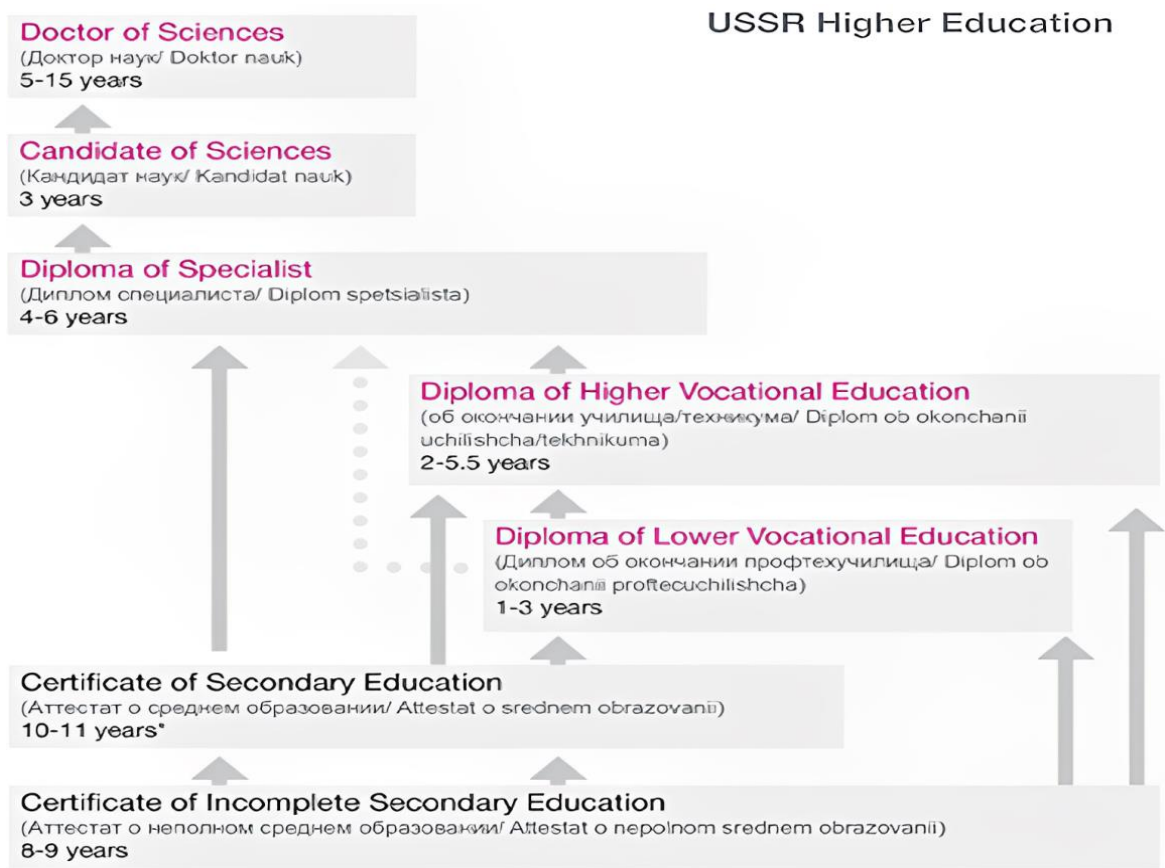
3.2 Independence and Economic Shift

Following its independence in 1991, Azerbaijan, strategically positioned at the crossroads of Eastern Europe and Western Asia, faced a major economic shift, transitioning from communism to a market economy. Azerbaijan, one of the 15 former Soviet republics was afflicted by significant difficulties such as endemic state instability, crime, ethnic conflicts, corruption, and competition over energy resources (Silova et al., 2007). It is well documented that the recession or regress era in economic development, which lasted from 1991 to 1994, was mostly caused by political upheavals (Aliyev & Suleymanov, 2015). During this era of transition, the continued war between Azerbaijan and Armenia, territorial loss as a result of this war, refugee and internally displaced people, political instability, Russian transportation "embargo", Chechen war, and other political factors contributed to a worsening of the economic situation in the country which also affected all areas including education (Kaynak & Nasirova, 2005). The regress era ended with regime change, and a new president took control of power with the promise of reform.

Amidst these tumultuous times, a significant development in the education sector was the adoption of the Education Law in 1992. This law was a critical step in Azerbaijan's journey towards building a national identity and transitioning from Soviet educational ideologies to a modern system. A fundamental change in the VET system, as outlined in this law, was the segregation of the previously unified lower and higher VET systems. The new legislation recognised only the lower VET, now simply referred to as the initial vocational education system, within the educational structure. It's noteworthy that the government's focus seemed to be more on delineating what the VET system was not rather than setting a clear vision and strategy for VET in the new socio-political and economic reality. Hence, the following chapters further explore the drivers behind these decisions, considering that the VET system's negative perception, a common issue in post-communist countries, might have influenced the government's approach (Loogma et al., 2019).

3.3 Education system before the reform

Nevertheless, to provide a nuanced understanding of Azerbaijan's VET system, it's important to outline the structure of its education and VET system prior to policy changes. Figure 3 below illustrates the education structure during the Soviet era, wherein two types of VET degrees, higher and lower VET qualifications, were evident. Even after gaining independence and prior to the adoption of the Law on Vocational Education, a similar system persisted in the Azerbaijani education system. Essentially, the primary difference post-independence was the reclassification of higher VET degrees, which were no longer considered vocational education degrees but rather labelled as Specialised Secondary Education.



*11-12 years in the Baltic republics

Figure 3 VET system during the USSR (Government of Alberta, 2024, p. 4)

However, aside from this name change, the fundamental structure remained essentially unchanged. Nevertheless, despite the coexistence of both systems, it's important to note that only the initial VET qualifications continued to be recognised as VET after the collapse of the Soviet Union. This distinction is also outlined in the Education Law adopted in 1992.

In practice, VET providers during this period included VET schools and VET lyceums—the key difference between the two lies in the program duration, with

VET lyceums offering 3-year programs. Graduates from VET lyceums had the opportunity to obtain matriculation, which allowed them to pursue higher education degrees. In terms of qualifications, the degrees offered in VET institutions were categorised as equivalent to ISCED levels 3 and 4.

3.4 Early Reforms in the Economy

From 1994 to 2005, the government focused on poverty alleviation and initiated early reforms with the support of international organizations like the IMF and World Bank. These early years also saw the beginning of oil and gas exports, which would later become a cornerstone of economic growth.

After 1995, the government's major goal was to reconstruct the shattered economy. In 1995, it began implementing extreme economic reforms in partnership with the IMF as part of its overall stabilisation programme in order to avoid hyperinflation (Baranick & Salayeva, 2005, p. 213). As a result, the use of currency rate-based conservative policies has been relatively successful in reducing inflation to a single-digit level in a short period of time (Dąbrowski, 2003, p. 17). The effects of these extreme economic reforms on the education sector are elaborated further in subsequent chapters. Consequently, Azerbaijan also received credit from the IMF for \$219 million in 1996 after completing IMF-supported stabilisation projects, primarily for structural reforms (IMF, 1997).

Simultaneously, Azerbaijan's collaboration with the World Bank and other foreign institutions grew, allowing the economy to be restructured more quickly. In all, 31 World Bank projects, totalling \$726.72 million, were completed in Azerbaijan during the transition period (Aliyev & Suleymanov, 2015). After securing mostly financial stability, the government began economic reforms aimed at constructing a market economic system, which included macroeconomic stabilisation, pricing and trade liberalisation, privatisation, assistance for emerging businesses, and the construction of a supportive legal framework (Aslund et al., 1996, p. 251). Against the backdrop of such economic measures, the government launched agricultural reforms such as land transfer to the private sector and privatisation of old state-owned farms (Thomas, 2006, p. 228).

Up until 2005, the government's primary goal was to alleviate poverty. According to a household survey conducted by the State Statistics Committee in 2001, 49 per cent of the population lived in absolute poverty (monthly income less than \$25.8), while 17 per cent lived in relative poverty (monthly income below 15.5 USD)

(Government of Azerbaijan, 2003). Although the poverty rate fell to 15.8% in 2007 as a result of the significant revenues from oil exports, poverty remained a key concern for the government (Government of Azerbaijan, 2008b). The major reform for poverty reduction and economic development was funded by the World Bank and executed through two state programmes for economic development and poverty reduction in 2003-2005 and 2008-2015, respectively.

Concerning initiatives in the education area, following the dissolution of the Soviet Union, a post-socialist education reform package was adopted in the area by international organizations. Between 1999 and 2012, the World Bank was the primary donor, providing a \$68 million three-phase education sector reform loan within the Education Sector Reform Project and the Education Sector Development Project (Silova & Steiner-Khamsi, 2008). Extension of the curriculum to eleven or twelve years of schooling, the introduction of new subjects (for example, English and computer literacy), student-centred learning, electives in upper secondary schools, the introduction of standards and/or outcomes-based education (OBE), decentralisation of educational finance and governance, and reorganisation (or "ratio") of educational finance and governance have all been most adopted policy tools by educational policymakers in former Soviet countries (Silova & Steiner-Khamsi, 2008).

The adaptation of existing educational systems to the new free-market environment, as well as the adoption of "international" or "Western" standards, were among the elements of post-socialist education reform. These changes included, among other things, introducing electives to boost the curriculum's flexibility and relevance, introducing choice and free-market processes in education, and so on. These changes were implemented in most nations to avoid falling behind on the world stage or, in the case of Azerbaijan, to demonstrate commitment to entering the "European education space" (Nóvoa & Lawn, 2002).

Although the majority of donor education money and reform efforts were focused on general education, the impetus for VET reform came from within the employment and labour institutions. As a result, VET reform is particularly prioritised among the medium-term employment goals in the National Employment Strategy (NES) of 2005 and the Programme on Implementation of the NES. The approved NES indicated the reform of the VET system as one of its eight goals, which also included improving the vocational education system, training

competitive human resources for the labour market, and diversifying education and human resource development finance (Government of Azerbaijan, 2005). Although the detailed analysis of the documentation is presented in the Findings chapter, it should be acknowledged that this VET system at this stage was underfunded and didn't function as a skills formation system but rather played a role of keeping administrative and teaching staff employed with the minimum salary.

3.5 Economic Growth and Social Development

The period from 2006 to 2012 was characterised by substantial economic growth driven by high gross domestic product (GDP) growth from oil and gas exports and a corresponding increase in reliance on a migrant workforce (Aliyev & Suleymanov, 2015). The government's commitment to VET reform, as outlined in the National Employment Strategy, led to the launch of the first State Program for VET System Development in 2007. However, amidst the global economic crisis and reduced education spending, the program's implementation faced challenges and ultimately remained largely an initiative rather than a fully realised reform (European Training Foundation, 2014).

The government faced many obstacles, including financial constraints, in fully committing to VET reform. Hence, the poverty alleviation phase continued until the end of 2005 when the Baku-Tbilisi-Ceyhan (BTC) oil export pipeline was opened. As a result, 2005 marks a turning point in Azerbaijan's economic development, with rapid economic growth and a large current account surplus. The opening of the BTC pipeline in 2005 significantly expanded oil production and exports, resulting in massive oil earnings that significantly altered the country's economic structure. As a result, following the 2007 pipeline, oil output surpassed 42 million tonnes (SOCAR, 2013, p. 7). Consequently, the GDP of Azerbaijan increased by 34.5 per cent in 2006 and 25.05 per cent in 2007. However, due to the 2008 global financial crisis and the reduction in oil output, GDP growth slowed after 2007, reaching barely 1% in 2011 (Aliyev & Suleymanov, 2015).

Another challenge was unemployment, which in 2007 was 6.7 per cent, according to the state statistics committee. However, younger age groups had substantially higher unemployment rates than the general population (24 per cent for those aged 24-29). According to the findings of the country's first survey on the economic activity of the population, conducted in May-June 2003 with financial support from the UNDP and technical help from the ILO, individuals under 35 made up 69.1% of

the unemployed. Among economically engaged youth aged 20-24, the greatest rate of unemployment (23.8 per cent) was recorded. This also highlighted the fact that a large portion of the working-age population is involved in informal employment opportunities, self-employment, and agriculture (Government of Azerbaijan, 2008a). The findings chapter of this thesis further unpacks the effects of these structural challenges on the education system and further analyses its influence on decisions concerning policy change in the VET system.

Additionally, unlike neighbouring Armenia and Georgia, Azerbaijan's population was steadily increasing, implying a growing labour force. Azerbaijan's population was 8.34 million in 2005, and it was expected to grow to 10.22 million by 2025. Between 2003 and 2010, the labour force was expected to grow by more than 18 per cent. In 2007, young people and children made up about 55% of the population (Government of Azerbaijan, 2008a). One of the most serious issues confronting these people was a lack of economic options, particularly in rural areas. Youth accounted for 51% of those who were officially unemployed. Consequently, the government reported widespread internal and external migration of young people to the country's major cities or other countries (Government of Azerbaijan, 2008b).

Hence, in the eve of these structural challenges in the economy, in a period of stagnation and increasing pressure from both multilateral organizations and local businesses within the non-oil sectors, the State Program for the Development of Technical Vocational Education in the Republic of Azerbaijan (2007-2012) (State Program) was adopted by the government. The program initially aimed to satisfy the demand for a skilled workforce that matched the developmental needs of Azerbaijan's economy (Government of Azerbaijan, 2007). It also sought to provide the population with opportunities to engage in modern vocational education.

Although a detailed analysis of the program is presented in the Findings chapter, it is important to note that the State Program represents a domestic initiative that was designed and implemented by the Ministry of Education without influence or support from donor organizations. This program was a self-driven effort by the Azerbaijani government to modernise its VET system and to align it with the country's economic development needs. Unlike many reforms in the post-Soviet space, which often saw significant international involvement, this particular program was a sovereign endeavour, demonstrating the government's initiative to

address the challenges within its vocational education sector independently and reinforcing its capacity to supply a skilled workforce for the nation's economy. The Ministry of Education's role was central to this process, underlining the government's initiative to lead the charge in educational reform without external assistance.

3.6 VET system overview

The VET system in Azerbaijan, a legacy from the USSR era, distinctly featured dual provisions. As depicted in Figure 3, the USSR's VET system was comprised of both lower and higher levels. The lower level, akin to initial VET, became more pronounced after Azerbaijan's Education Law was enacted in 1992. The Soviet Union's concept of Higher VET, which emphasised "polytechnical education" (Castles & Wüstenberg, 1979), was redefined after Azerbaijan's independence. Hence, until the policy change in 2018, VET referred strictly to Initial Vocational Education (IVET). Higher-level vocational training fell under a separate category called Secondary Specialised Education, with its own distinct regulations, administration, and curriculum.

During the Soviet era, IVET institutions were frequently integrated into large state enterprises, falling under respective ministries like Transport, Shipbuilding, or Agriculture rather than the Ministry of Education (Zajda, 1984). The 2009 Education Law further marked significant shifts within IVET, including the introduction of 'double qualifications,' combining professional training with the Matura or an equivalent secondary-school qualification, thereby facilitating access to higher education. For the reasons indicated above for this research, when referring to VET in the Azerbaijani context, the focus is on initial vocational education and training (IVET), which, as shown in Figure 4, spans six months to 3 years post-basic education and unlike the Higher VET has also been the subject of numerous reform initiatives. The reasons why Higher VET did not undergo similar reforms are intriguing but fall outside the scope of this study and warrant separate investigations.

Azerbaijan

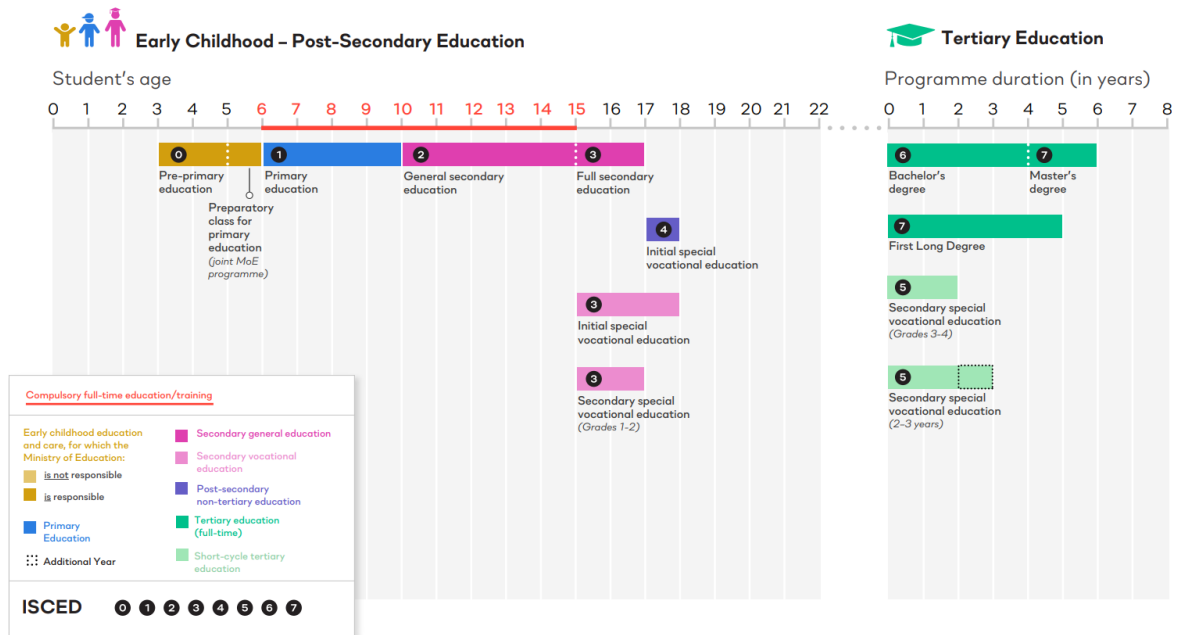


Figure 4 Current Education System of Azerbaijan (UNESCO, 2021)

Nevertheless, by the end of 2012, Azerbaijan's VET system, despite undergoing reform attempts since 2007, faced significant challenges in aligning with labour market demands and ensuring equitable capacity or development across its institutions. Despite the reform attempt, the staff training initiatives had only been partially successful, with many teachers and managers not benefiting significantly from the training, indicating a disconnect between training content and the needs of modern VET education (Castel-Branco, 2008). Furthermore, the increase in school autonomy and closer links with enterprises were not realised, with most cooperation facilitated through the Ministry of Education rather than local initiatives. This limited the potential for grassroots initiatives and responsiveness to local labour market needs. Additionally, the system faced a fragmented approach to skill needs anticipation, with multiple public bodies conducting initiatives without adequate coordination. The disparities in infrastructure and resources between restructured and non-restructured schools led to uneven educational outcomes in terms of academic performance and employability across the VET system (European Training Foundation, 2014). A notable gender imbalance in the teaching workforce was also evident, with a significant majority being female, driven by social attributions and economic factors. These challenges were compounded by a lack of holistic attention to educational reform, indicating a need for a more integrated approach to education policy and practice.

Moreover, the reform process initiated in 2007 lacked systematic stakeholder involvement, essential for successful policy design and implementation, and there was an absence of intermediate evaluations or feedback mechanisms to assess reform progress. This highlighted a gap in ensuring the effectiveness of the reform process. The State Program faced challenges in achieving coherence among different ministries and levels of government, with a predominantly top-down approach hindering the development of a unified and effective VET system (European Training Foundation, 2014). The government's labour market research in the regions was commissioned too late to build the reform strategy systematically on evidence from socioeconomic developments (European Training Foundation, 2014). These challenges underscored the need for more inclusive, responsive, and participatory approaches in VET policymaking and implementation to ensure a coherent and effective VET system that aligns with labour market needs and equitable development across all institutions.

Nevertheless, from 2012 to 2018, strategic developments in VET were undertaken with the material and ideational support of the European Union, which is further elaborated as a part of this study presented in this thesis. As part of the strategic documents such as "Turning Black Gold into Human Gold: Using Oil Revenues to Attain Sustainable Development" (Hopkins, 2006) and "Azerbaijan 2020: Vision for the Future" (Government of Azerbaijan, 2012), there was an emphasis on diversifying the economy and building human capital, with a particular role dedicated to the VET system. Hence, after 2013, a new strategy for the development of education was introduced, and new leadership was appointed within the Ministry of Education to focus on industrialization and labour market integration. The establishment of the State Agency for Vocational Education and the development of the Strategic Roadmap for VET by McKinsey & Company were pivotal within the VET reform initiatives. This period also saw the provision of EU technical assistance for the development of the Law on Vocational Education.

The subsequent chapters of this thesis systematically analyse the period between 2012 and 2018 by delving into the main drivers of certain decisions that led to policy change and ultimately identifying the role of the EU within the policy change process. This comprehensive examination explores how these strategic decisions and the involvement of the European Union shaped the evolution of Azerbaijan's VET system, highlighting key shifts in policy discourse and drivers of policy adoption during this critical period. The analysis aims to provide a nuanced

understanding of the interplay between local initiatives and international influence in shaping the VET landscape in Azerbaijan.

3.7 Conclusion

In conclusion, this chapter has provided an overview of the VET system's reform attempt in Azerbaijan, particularly its historical evolution and development. The narrative began with the country's transition from communism to a market economy following independence in 1991. This period was marked by significant challenges, including political upheaval, economic instability, and the Nagorno-Karabakh conflict, which had profound impacts on the country's educational and economic systems. The analysis then shifted to the early reforms for poverty alleviation and economic stabilization, supported by international organizations such as the IMF and the World Bank. These reforms laid the foundation for Azerbaijan's subsequent economic growth, driven by oil and gas exports, and set the stage for more focused educational reforms.

The chapter also detailed the State Program for the Development of Technical Vocational Education in Azerbaijan (2007-2012), a domestic initiative aimed at modernizing the VET system in alignment with the country's economic development needs. This program represented a significant step in the government's efforts to independently address challenges within the vocational education sector, underscoring its commitment to developing a skilled workforce. The narrative concluded with an overview of the strategic developments in the VET system from 2012 to 2018. This period saw initiatives aimed at diversifying the economy and building human capital, with an emphasis on VET. Key milestones included the introduction of a new education strategy, the appointment of new leadership in the Ministry of Education, and the establishment of the State Agency for Vocational Education. These developments marked a critical phase in the evolution of Azerbaijan's VET system, reflecting both the challenges encountered and the successes achieved in the journey towards VET reform and socio-economic development.

The chronological narrative of VET reforms, starting from the early post-independence struggles to the introduction of major educational strategies, lays the foundation for a comprehensive analysis in the following chapters. It highlights the intersection of local initiatives and global influences in shaping Azerbaijan's educational landscape, thereby setting the context for a deeper understanding of the contemporary VET system.

This chapter establishes the historical foundation for understanding the policy change process within Azerbaijan's VET system. It is revisited throughout the analysis, connecting past contexts to ongoing reforms, strategies, and their impact on policy. This approach illuminates not only the drivers of policy change but also the challenges and opportunities that have shaped its evolution. Building on this foundation, the next chapter delves into the literature on policy transfer, exploring the main actors, mechanisms, theories, and debates surrounding this concept. This provides a critical lens through which to examine how international influences, including those from the EU, have informed VET reform efforts in Azerbaijan.

CHAPTER 4: LITERATURE REVIEW ON THE INFLUENCE OF INTERNATIONAL ORGANIZATIONS ON EDUCATION POLICIES ACROSS COUNTRIES

4.1 Introduction

The main aim of conducting the literature review is to explore and understand the influence of international organizations on the development of education policies across countries. This involves examining the mechanisms and tools these organizations use to exert influence, as well as the conceptual and theoretical frameworks that explain the process and motivations behind policy transfer and adoption. The chapter begins by identifying key global players influential in education in general and VET policies in particular, with a focus on their mechanisms and tools for policy dissemination. The chapter further examines the motivations behind policy transfer from both IOs' strategies and recipient countries' perspectives. By critically analysing the latest debates and literature on the subject, this chapter aims to provide a general understanding of the global transfer of VET policies, setting the stage for introducing the conceptual framework in the next chapter, aligning the study within the broader academic discourse, and justifying the research approach in the study.

4.2 Major Influencers in Global VET Development

Prior to analysing the impact of international organizations on the education policies of various countries, it is crucial to identify the specific international bodies that have exerted influence within the realm of education. Table 2 indicates the main international organizations that are influential in supporting the policy initiatives in VET around the world.

Given that this study concentrates on Europe, the organizations of interest are those predominantly active within this region. The literature in the field indicates that multilateral institutions, such as UN agencies and development banks, were perhaps the most influential institutions in the post-world war period when it came to supporting education and VET reforms around the world (Mundy, 1998; Gilbert & Vines, 2006; Mundy & Verger, 2015; Edwards, 2018a). Thus, entities under the United Nations umbrella, such as UNESCO, UNDP, UNICEF, the World Bank, and the ILO, have played significant roles, and each organization contributes distinctively to shaping education and VET strategies and setting global standards, thereby impacting nations worldwide. UNESCO, for instance, has been instrumental in developing international educational standards and frameworks, evidenced through initiatives like the Education for All (EFA) movement and the

Sustainable Development Goals (SDGs), especially Goal 4⁶ (Zapp, 2021). Additionally, UNESCO's organization of global conferences, such as the World Education Forum, underscores its role in facilitating policy dialogue and shaping the global education agenda (Jakobi, 2009). While UNESCO at large addresses education in a broad sense, its specialised centre, UNESCO-UNEVOC, is specifically dedicated to VET (Shaw et al., 2016). A notable example is UNESCO's involvement in Azerbaijan's VET sector where in 1995, UNESCO dispatched a consultancy mission to Azerbaijan at the request of the Ministry of Education, aimed at assisting the government in developing and improving its technical and vocational education system (UNESCO, 1997). Nevertheless, it is also important to note that researchers highlight concerns about UNESCO's strategies in global education governance, questioning their effectiveness and adaptability across diverse socio-cultural contexts and the challenges of limited resources and varied institutional capacities to implement its policy recommendations at national levels (Edwards et al., 2018).

Parallel to UNESCO, the World Bank's role in education reform as the principal funder of international development in education is marked by a dual focus on lending for policy reform and research for knowledge creation (Edwards et al., 2023). Its strategic shifts in educational priorities towards the development of human capital since 1962 have significantly influenced global education trends, including VET policies (Belot, 1995; Lauglo, 1996; Gilbert & Vines, 2006; Mundy & Verger, 2015; Edwards et al., 2021). The International Labour Organization (ILO), on the other hand, complements these efforts with its transition from formal standard-setting to 'soft law' instruments in influencing VET policies. This strategic shift, favouring Recommendations and Declarations over legally binding conventions aligns with the practical challenges of achieving global consensus on labour standards (Jakovleski et al., 2019). The ILO's approach to decentralised governance mechanisms and strategic partnerships further extends its impact in the VET sector (Jakovleski et al., 2019). Additionally, the UNDP has also played a vital role in specific educational projects, often reflecting the priorities of the countries where it operates. In Azerbaijan, for instance, UNDP's engagement in

⁶ Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all UNESCO. (2017). *Education for Sustainable Development Goals Learning Objectives*. https://unesdoc.unesco.org/ark:/48223/pf0000247444_eng

VET began in 2016, mainly through school-level projects funded by the European Union, aimed at aligning VET institutions with labour market needs (UNDP, 2021).

When it comes to an influence shaping the education policy in Europe, apart from the European Union's institutions, an important player is the Organisation for Economic Co-operation and Development (OECD), which plays the role of a forum or a network of policy-makers, researchers and consultants for the establishment of international standards and benchmarks (Rizvi & Lingard, 2009b). The OECD's activities are increasingly technical and data-driven, aimed at providing analysis and knowledge products to advise and support evidence-based policies (Rizvi & Lingard, 2009b). Furthermore, OECD utilises the Programme for International Student Assessment (PISA) and Programme for the International Assessment of Adult Competencies (PIAAC) international "skills"- testing programs as an instrument for data collection and analysis on adult "skills", including literacy, numeracy and problem-solving in technology-rich environments (Green, 2016; Bacchi, 2020).

In the realm of international education, Bilateral Agencies, NGOs and Foundations play a significant role in shaping policies. Bilateral Agencies, like USAID and JICA, utilise foreign aid and technical expertise to influence education systems in other countries. This influence can often steer policies towards approaches favoured by the donor nation (Edkins, 1999; Silova & Steiner-Khamsi, 2008; Kingombe, 2012; Verger & Fontdevila, 2023). Similarly, NGOs and Foundations, such as the Bill and Melinda Gates Foundation, impact education through targeted programs and funding initiatives. These organizations can directly influence educational policies and practices by strategically allocating resources and promoting specific program designs. However, it's important to note that this influence is not universal. In the context of Azerbaijan, for instance, neither Bilateral Agencies nor NGOs and Foundations have been particularly active in the education and VET fields. Consequently, their influence on educational and VET policy development has been limited.

Table 2 Global players in education

| Organization | Focus/Approach | Influence on Countries |
|--------------|---|---|
| UNESCO | Setting global educational standards, promoting inclusive and equitable education, policy | Adoption of global educational standards. Tracking towards SDG 4. |

| | | |
|----------------------|--|---|
| | frameworks, and global conferences. | |
| UNDP | Integrating educational policies with development goals, capacity building, technical assistance, and policy advisory. | Policy alignment with broader development goals and enhanced educational capacity. |
| World Bank | Funding, research, and policy advisory focused on access, quality improvement, and system reforms. | Educational system reforms, access improvement, quality enhancement. Conditionality, loans and grant funding. |
| UNICEF | Children's education, rights-based approaches, program funding, advocacy, and government partnerships. | Advancement of children's rights in education, partnership with governments for policy changes. |
| ILO | Vocational training and skills development, linking education with labour market needs. | The alignment of VET with labour market needs and policy focus on employability and responsiveness to economic changes. |
| OECD | Comparative educational studies (like PISA), benchmarking, data-driven policy analysis and recommendations. | Influencing national educational policies through global benchmarking and comparative analysis. |
| European Union (EU) | Funding programs (e.g., Erasmus+), policy frameworks, directives, collaborative projects, harmonizing educational standards. | Aligning educational systems with EU standards, focus on curriculum development, teacher training, and quality assurance. |
| Bilateral Agencies | Influencing education in other countries through aid and technical assistance (e.g., USAID, former DFID, JICA). | Influence through development aid, shaping policies in line with donor countries' approaches. |
| NGOs and Foundations | Influencing education through targeted programs and funding (e.g., Bill and Melinda Gates Foundation, Aga Khan Foundation). | Direct influence on educational policies and practices through program funding and initiatives. |

4.3 The Methods and Mechanisms of International Influence on Education Policy

This section delves into the methods through which international organizations impact policies related to education in various countries. It specifically examines the existing literature to uncover the tools and mechanisms employed by these

organizations to shape education and VET policies worldwide. Therefore, this analysis covers the notions of "policy transfer" and "global education policy," which are commonly emphasised in the literature as strategies used by international organizations in their connections with countries.

It is firstly acknowledged that the influence of international organizations in the global education policy field stems from, on the one hand, their access to significant financial and organizational resources. On the other hand, it comes from their strategic ability to utilise these resources to advocate for specific educational reforms, such as those emphasizing inclusivity, quality, and global competitiveness (Barnett & Finnemore, 2004; Grek, 2020). They also have the capacity to shape the discourse around which types of reform are viewed as desirable or necessary (Heimo & Syväteri, 2022). This is achieved through mechanisms such as funding strategic initiatives, providing expert policy advice, facilitating international collaborations, and establishing benchmarks and standards that define educational excellence globally (Heyneman & Lee, 2016). As a result, these organizations play a crucial role in setting the agenda for education reform, influencing not only the specific policies adopted by nations but also the overarching goals and values that underpin the global education system (Barnett & Finnemore, 2004; Jakobi, 2009; Lenz, 2017).

As globalization intensifies, the concept of "policy transfer" has garnered significant attention within the domain of global education policy. This mechanism serves as a crucial tool for IOs to exert influence on educational systems across national borders (Evans, 2009, 2019). Dolowitz and Marsh define policy transfer as a process by which knowledge about policies, administrative arrangements, institutions, and ideas in one political setting is used in the development of policies, administrative arrangements, and institutions in another political setting (2000, p. 5). So, policy transfer involves the process by which knowledge, ideas, and practices are moved from one context to another, often facilitated by IOs aiming to foster a global or regional agenda in education. In this present research 'policy transfer' is used as a term to cover the entire array of subjects corresponding to the travel of policy ideas between IOs and countries throughout all stages of the mechanisms of initiating and implementing educational policies (Phillips & Ochs, 2003). Though contested by some scholars the term policy transfer has often been used interchangeably (Phillips & Ochs, 2003). It should be acknowledged that the use of particular terminology changes depending on the

fields and disciplines i.e., political scientists describe the process as ‘policy transfer’, ‘policy diffusion’ and ‘lesson-drawing’ (Dolowitz & Marsh, 1996; Dolowitz & Marsh, 2000; Davies et al., 2005) when scholars from other disciplines preferred to use ‘institutional transplantation’, ‘policy mobility’ or ‘policy mutation’ instead (Cochrane & Ward, 2012; Peck & Theodore, 2012; Mukhtarov, 2014).

Policy transfer in this case is similar to the policy mobilities concept where the examination of how policies travel, adapt, and are recontextualised as they move across diverse geographic and political spaces is the focus of the research. Policy mobilities is a valuable framework for understanding the interactions between different scales—global, national, regional, and local thus reflecting the fluid interactions between levels of governance (Mckenzie & Aikens, 2021). While policy mobilities is particularly useful for studying policy adoption and implementation, where examination of subnational settings is crucial, my research focuses on the policy adoption phase, where the primary interest lies in identifying the global-local factors influencing policy change. Therefore, the concept of policy transfer is more appropriate for this study, as it provides a clearer framework for tracing how global policies are adopted in local contexts without focusing on the dynamic reworking of scales or the mutation of policies during movement, which is central to policy mobilities (Lewis, 2021).

4.3.1 Types of Policy Transfer

The mechanisms through which IOs influence national VET policies are a focal point in the literature on policy transfer and educational reform. Scholars have identified several key mechanisms, each contributing to the transfer of policies across borders. Thus, policy transfer in VET can occur through various mechanisms, including voluntary borrowing, coercive transfer, policy learning, and diffusion. Hence, a cornerstone of the transfer literature is the distinction between learning, competition, coercion and emulation (Gilardi & Wasserfallen, 2019; Osorio Gonnet, 2020; Dobbins et al., 2023). These mechanisms summarise the main forces of transfer as policymakers are influenced (a) by the success or failure of policies elsewhere (learning), (b) by policies of other units with which they compete for resources (competition), (c) by the pressure from international organisations or powerful countries (coercion) and (d) by the perceived appropriateness of policies (emulation) (Gilardi & Wasserfallen, 2019). Table 3 summarises these types of policy transfers.

Table 3 Types of Policy Transfer

| Type of Transfer | Description |
|---------------------|---|
| Voluntary Borrowing | Occurs when governments actively seek out and adopt policies from others, often through research, collaboration, or exchange programs. This can involve adapting existing policies to fit their context. |
| Coercion | Involves pressure from international organizations or powerful countries to adopt specific policies, often as a condition for aid or membership. This can limit autonomy but may lead to faster reforms. |
| Learning | Represents a more reflective process where countries adopt policies based on the observed successes or failures of similar policies elsewhere. This involves analysis and adaptation to fit the local context. |
| Diffusion | Refers to the passive spread of policy ideas through globalization and the influence of transnational networks. This can occur through direct influence (e.g., international organizations) or indirect emulation (e.g., mimicking successful practices). |
| Competition | Countries, regions, or institutions compete for resources and reputation, encouraging them to adopt "best practices" observed in others. This can lead to convergence but also creates pressure to follow trends. |
| Emulation | Driven by the social construction of appropriate policies, where countries conform to norms and simulate the behaviour of others, regardless of objective effectiveness. This can promote legitimacy and cooperation but may lead to uncritical adoption. |
| Lesson-Drawing | Like competition, actors actively seek and adapt successful policies from others to solve similar problems in their own context. This requires careful analysis and adaptation to ensure transferability. |
| Normative Emulation | Countries adopt policies not just for effectiveness but also to increase legitimacy or gain acceptance within a community or international system. This can strengthen cooperation but may prioritise form over function. |
| Mimicry | A passive form of emulation where countries simply imitate others' practices without deep understanding or adaptation. This can be quick but risks ineffective implementation and wasted resources. |

Overall, policy transfer is understood as a dynamic process by which ideas, norms, or policies are disseminated across time and space. Two primary mechanisms drive this process. Firstly, diffusion can occur through direct influence, where an agent

actively promotes specific policies or institutional models within their network, influencing the actions of a receiving actor or group. Second, Indirect mechanisms involve the more subtle, often unintentional, spread of policies and practices through cultural, normative, or passive influences. These mechanisms do not involve straightforward action from one entity to another but rather occur through broader processes of globalization, socialisation, and emulation (Simmons & Elkins, 2004; Simmons et al., 2007).

Direct policy transfer

The policy transfer through explicit, intentional efforts by IOs would be categorised as direct policy transfer. These mechanisms, characterised by their clear intentionality and formalised processes, include coercion or voluntary borrowing. Each mechanism represents a distinct approach to policy transfer depending on the method of policy adoption.

Coercion is a prominent direct mechanism where international organizations or powerful countries exert pressure on nations to adopt specific policies, often as a prerequisite for financial aid, technical assistance, or membership in international bodies. This form of policy transfer is marked by its explicit nature, where the conditions for aid or cooperation are clearly defined, limiting the recipient's policy autonomy. Belot, for example, has shown in her research on post-Soviet countries how institutions like the International Monetary Fund and the World Bank leverage financial incentives to instigate policy reforms, a practice that, while effective in implementing rapid reforms, may not always align with the recipient country's specific needs or contexts (1995).

Voluntary borrowing, in contrast, involves a proactive and deliberate effort by countries to seek out, adopt, and adapt policies from others. This mechanism is predicated on the recognition of successful policies elsewhere and a calculated decision to replicate these successes within a new national context. Stone (2012) highlights the role of research, collaboration, and exchange programs in facilitating voluntary borrowing, emphasizing the mechanism of adapting borrowed policies to fit local needs and circumstances. Gilardi and Wasserfallen indicate that "policy learning is heavily mediated by politics, and decision makers systematically assess the policy experiences of other subnational units and filter the policy experiences of others through their ideological stances" (2019, p. 1247). This approach to policy transfer underscores the importance of

“evidence-based policy-making⁷” and the capacity of national policymakers to engage in critical analysis and contextual adaptation. Lesson-drawing, additionally closely related to learning, involves a more specific and targeted search for solutions to existing policy challenges by looking at how similar problems have been addressed in other contexts. Dolowitz and Marsh indicate that lesson-drawing is the process of identifying, analysing, and adapting policies from elsewhere to address domestic issues (2000). This mechanism requires a deep understanding of both the source and target contexts to ensure the successful transfer and implementation of policies. It is an active process that involves careful consideration of the transferability and adaptability of foreign policies, ensuring that lessons drawn from other contexts are applicable and effective when applied domestically.

In summary, direct mechanisms of policy transfer in VET are characterised by their intentionality, explicitness, and the active role of national policymakers in the transfer process. Whether through coercion or voluntary borrowing, these mechanisms involve deliberate efforts to influence, adopt, and adapt educational policies in response to global trends, international pressures, or recognised best practices. Understanding these mechanisms and their implications is crucial for analysing policy adoption for this case study.

Indirect policy transfer

A nuanced analysis of indirect policy transfer mechanisms is crucial for achieving a comprehensive understanding of how educational reforms are shaped by influences that extend beyond deliberate or overt actions. Indirect mechanisms like diffusion, emulation (both normative and mimetic), and competition exert their influence on policy formation through nuanced and often less overt channels, shaping outcomes in ways that defy direct control by specific actors or agreements. These mechanisms highlight the complex interplay of global trends, cultural norms, and the broader socio-political context in the evolution of national VET policies (Grin & Loeber, 2006).

Diffusion represents a key indirect mechanism characterised by the passive spread of policy ideas and practices across borders through globalization and the

⁷ a process that integrates the best available evidence from research and practice into the decision-making process to formulate and implement policies.

influence of transnational networks⁸ (Castells, 2010; Menashy & Verger, 2019). This process often unfolds without direct intervention from one country to another, facilitated instead by the global flow of information, the interconnectedness of societies, and the activities of international organizations. Simmons et al. (2007) elucidate how diffusion occurs both through direct influence, where international bodies actively promote certain policies and through indirect emulation, where countries adopt policies based on their observation of global trends or the success of these policies in other contexts.

Competition is another indirect mechanism driven by the desire of countries, regions, or institutions to attract resources, talent, and investment. This form of policy transfer is motivated by the need to maintain or enhance competitiveness on the global stage, leading to the adoption of "best practices" observed in other countries. Along with Simmons (2007), Börzel (2009; 2013), with a focus on Eastern European countries, indicated that this competitive pressure not only fosters policy change but also encourages convergence towards policies deemed successful internationally, even if the adoption process is not guided by direct external pressure.

Emulation and normative emulation, on the other hand, involve the adoption of policies based on their symbolic value or alignment with internationally recognised norms and standards (Finnemore & Sikkink, 2001). This mechanism is largely influenced by the social construction of appropriateness, where policies are adopted not necessarily because of their proven effectiveness but because they represent the norms of a peer group or the broader international community. Inspired by sociological research, emulation focuses on the social construction of appropriate policies (in contrast to the objective properties of policies). Accordingly, norms and conventions are socially constructed, and policymakers conform to these norms with the adoption of appropriate policies (Finnemore & Sikkink, 2001). Prominent examples are the diffusion of educational and human rights policies (Gilardi & Wasserfallen, 2019). According to the emulation mechanism discussed above, policies can spread simply because of their symbolic properties. Therefore, emulation serves, to some extent, as a supplementary

⁸ groups or systems that operate across national borders, connecting individuals, organizations, or states in various fields such as economics, politics, environmental advocacy, or social issues. These networks facilitate the exchange of ideas, resources, and support, influencing policy-making, cultural exchange, and global governance

mechanism of diffusion, encompassing research that does not assume rational and fact-based assessments of policy consequences (Gilardi & Wasserfallen, 2019). Emulation only requires agents looking for institutional designs outside their realm to solve certain problems or to mimic the behaviour of their peers (Börzel & Risse, 2012). Furthermore, mimicry or Isomorphic mimicry, a subset of emulation, involves the passive imitation of policies and practices observed in other countries, often without a deep understanding of their underlying principles or effectiveness (Smith et al., 2023). It is a process driven by the perception that certain policies or practices are universally applicable or beneficial, leading to their adoption without significant adaptation to the local context (Andrews et al., 2017). While mimicry can facilitate the rapid dissemination of policies, it raises concerns about the suitability and sustainability of these policies, given the lack of critical evaluation and contextualization.

Overall, identifying indirect mechanisms of policy transfer is significant since they reflect the broader dynamics of globalization, the influence of cultural and normative pressures, and the complex interplay between global trends and local contexts. Understanding these mechanisms is crucial for this study since it sheds light on the character of cooperation between the country and IOs. Thus, in the context of examining the influence of IOs on the adoption of VET policies by states, distinguishing between direct and indirect mechanisms provides an understanding essential for addressing the research questions posed in the thesis. This differentiation is pivotal for analysing the multifaceted ways in which IOs shape national education policies, offering insights into the balance of power, autonomy, and policy effectiveness within the global educational landscape.

4.3.2 Tools and Mechanisms of Influence

Along with understanding the nature or methods of the influence, it is also important to understand a variety of tools which IOs employ to influence VET policies in countries. These tools and mechanisms are designed to transfer ideas and knowledge from IOs to countries depending on the nature of cooperation between entities. Table 4 summarises several key strategies through which IOs exert their influence, as highlighted in the academic literature.

Table 4 Tools and mechanisms of policy influence

| Type of Tool/Mechanism | Description of the Mechanism |
|--|--|
| Conditional Funding and Technical Assistance | IOs link financial aid and technical support to the adoption of specific VET policies or reforms, directly influencing national policy decisions through financial incentives. |
| Policy Recommendations and Guidelines | IOs publish normative guidance, including policy recommendations and best practice frameworks, to serve as reference points for national policymakers in developing VET policies. |
| Capacity Building Programs | Through training programs and workshops, IOs enhance the expertise and administrative capabilities of national VET policymakers, educators, and trainers. |
| Benchmarking and Performance Monitoring | IOs use benchmarking tools and performance monitoring systems to evaluate and compare the education systems of countries, encouraging policy change to improve international standing. |
| Policy Dialogues and International Fora | IOs facilitate the exchange of ideas and practices among countries by organizing policy dialogues, conferences, and international forums, promoting the diffusion of policy ideas. |
| Research and Policy Analysis | By conducting and disseminating research on VET issues, IOs provide countries with evidence-based insights and data to inform policy decisions, highlighting global trends and challenges. |
| Partnerships and Collaboration | IOs establish partnerships with governments, educational institutions, and other stakeholders for joint projects aimed at reforming VET systems, ensuring alignment with international best practices. |
| Norm Setting and Soft Law | Through declarations, charters, and frameworks, IOs create non-legally binding instruments that define international standards for VET policies, exerting normative pressure on countries. |
| Advocacy and Awareness Raising | IOs engage in campaigns to emphasise the significance of VET for economic development and social inclusion, persuading countries to prioritise VET in their national agendas. |

Overall, literature on policy transfer in VET categorises the tools and mechanisms used by IOs to influence vocational education policies into "soft" and "hard"

mechanisms for exploring the nature and the extent of their influence (Stone, 2012; Verger et al., 2016). Soft mechanisms refer to non-coercive, persuasive strategies that rely on normative pressure, knowledge dissemination, and capacity building to encourage policy adoption. In contrast, hard mechanisms involve more direct, sometimes coercive, approaches, including financial incentives or conditions tied to assistance, which have more immediate and tangible impacts on policy decisions.

Soft mechanisms

Soft mechanisms employed by IOs to influence VET policies in countries are characterised by their reliance on persuasion, normative pressure, and collaborative efforts rather than direct coercion or financial incentives. In essence, these mechanisms aimed at fostering an environment for policy change by encouraging voluntary alignment with international standards and best practices.

Policy recommendations and guidelines stand as a cornerstone among soft mechanisms, providing countries with a blueprint for reforming their education systems. By disseminating best practices, IOs like UNESCO and the OECD offer normative guidance that helps countries conceptualise and implement policies that are in line with “global standards⁹” (Jakobi, 2009). This approach not only promotes policy coherence across countries but also exerts significant pressure on governments. This pressure often comes from the need for countries to align with global standards, attract international funding, or enhance their global competitiveness.

Capacity-building programs further exemplify soft mechanisms by enabling countries to develop the necessary skills, knowledge, and administrative capabilities to undertake effective VET reforms. Through workshops, training sessions, and technical assistance, IOs play a crucial role in influencing institutional and human resources and shaping the capacities required for the planning, implementation, and evaluation of VET policies (Busemeyer & Trampusch, 2012). The facilitation of policy dialogues and international fora by IOs, on the other hand, constitutes another platform where the exchange of ideas,

⁹ internationally recognized benchmarks and frameworks set by organizations like UNESCO, OECD, and the World Bank designed to ensure national education policies to align with global goals

experiences, and practices among policymakers, educators, and stakeholders from different countries takes place (Jakobi, 2012). By fostering an environment of dialogue and collaboration, IOs often diffuse global policy ideas, thereby indirectly influencing the adoption of policies that reflect IOs' shared objectives and recommendations. During these policy dialogue meetings, research and policy analysis conducted by IOs are often presented as innovations in the field. Through these studies, reports, and policy briefs, IOs offer insights into global trends, challenges, and opportunities within the VET sector under the slogan of supporting evidence-based policymaking and helping countries to modernise their VET system based on international best practice (Crossley, 2019; Evans, 2019). Within the platforms of conferences and policy dialogues, IOs get together with policymakers and other relevant stakeholders and facilitate partnerships and collaborations not only between IOs and national governments but also between nations where they conduct advocacy and awareness-raising in achieving broader economic and social goals (Verger, Fontdevila, et al., 2018). This advocacy is mostly exercised to motivate countries to prioritise reforms that align their policies with overarching global objectives. At the end of the conferences and policy dialogues, soft law instruments, such as declarations and frameworks, are usually adopted, which also represent a subtle yet influential mechanism through which IOs shape global norms and expectations regarding VET policies (Rutkowski, 2007). Although not legally binding, these instruments exert significant normative pressure on countries to conform to internationally recognised standards and practices, promoting a gradual alignment of national policies with global trends (Robertson, 2012).

In summary, soft mechanisms represent a spectrum of strategies that IOs utilise to influence VET policy reforms indirectly. These mechanisms leverage the power of persuasion, capacity building, collaboration, and normative alignment to encourage voluntary policy adoption and adaptation. Understanding these soft mechanisms is essential for comprehensively analysing how the EU influenced the VET policy change in Azerbaijan.

Hard mechanisms

Hard mechanisms employed by IOs to influence VET policies in countries are characterised by more direct, often conditional approaches that can include financial incentives, specific policy mandates, and performance-based evaluations. Unlike soft mechanisms, which rely on persuasion and normative pressures, hard mechanisms exert a more tangible, immediate influence on

national policy decisions, often requiring specific actions or reforms as a condition for receiving support.

Conditional funding and technical assistance are primary examples of hard mechanisms. IOs such as the World Bank and the International Monetary Fund often provide financial aid or technical support to countries contingent upon the adoption of certain VET policies or reforms (Shipan & Volden, 2008; Edwards et al., 2023). This form of assistance is directly tied to specific policy outcomes, creating a clear incentive for countries to align their VET policies with the expectations or standards set forth by the IO (Heimo & Syväterä, 2022). The direct nature of this mechanism allows IOs to influence policy decisions straightforwardly, but it also raises questions about national autonomy and the suitability of imposed policies for local contexts.

Additionally, benchmarking and performance monitoring constitute another hard mechanism through which IOs can influence VET policies (Mihaljević Kosor et al., 2019). By establishing benchmarks and conducting regular evaluations of countries' VET systems, IOs create a competitive environment that encourages nations to improve their policies and practices to meet international standards (Busemeyer & Trampusch, 2012). This mechanism relies on the collection and analysis of data to assess performance, making it a powerful tool for promoting accountability and encouraging policy reforms based on empirical evidence.

These hard mechanisms are integral to the strategies employed by IOs to promote the adoption of VET policies that align with global trends and standards. By leveraging financial resources and technical expertise, IOs can exert a significant influence on the direction of national VET policies. Distinguishing between soft and hard mechanisms is pivotal in understanding the nuanced ways through which IOs influence the adoption of VET policies by states, a core aspect that underpins the analytical framework of this thesis. This differentiation sheds light on the spectrum of IOs' strategies, from the exertion of direct, tangible pressures through hard mechanisms, such as conditional funding and technical assistance, to the subtler, normative influences of soft mechanisms, including policy recommendations and capacity-building programs. Recognizing this distinction allows for a deeper analysis of how states navigate the complex interplay of autonomy, compliance, and adaptation in the face of international influences,

directly addressing the research questions about the extent, nature, and effectiveness of EUs' impact on Azerbaijani VET policies.

4.4 Global Education Policies

The concept of "global education policies" refers to educational strategies, frameworks, and practices that are circulated and adopted across different countries and regions, often facilitated by IOs in the form of a package or program (Robertson, 2012; Mundy et al., 2016; Verger, Novelli, et al., 2018). Global education policies are shaped by the complex interactions between economic and political globalization, influencing education systems and, consequently, broader social spheres, including VET. Examining the interconnectivity of the global policy landscape, scholars point out that the expansion of global social interactions has linked distant places so closely that local events are shaped by happenings hundreds of miles away and vice versa (Jakobi, 2009; Giddens, 2011). According to some scholars, because economic, financial, and political globalization have a significant impact on economies throughout the world, it is logical to anticipate that learning and training systems in various nations are altered as a result of convergence¹⁰ (Käpplinger, 2011). Globalization forces are characterised as the increasingly entwined ties that exist between economies, nation-states, cultures, and institutions, which have also affected modern trends and have substantial effects on education policy and reform implementation worldwide (Burbules & Torres, 2000).

Some scholars claim that since the late 1980s, the deregulation of world commerce, the progress of information and communication technologies, and corporate capitalism have put pressure on national government agencies to reorganise their education systems and integrate them with international organizations' neoliberal business models (Dale, 2000; Castells, 2009; Zajda, 2018). According to scholars, economic globalization has severely limited the role of the national state in setting national economic and social policies (Giddens, 2011; Green, 2016). As a result of globalisation, commercialisation, efficiency initiatives, and systemic and contextual changes in education policy, a greater

¹⁰ in the context of international education policy, refers to the process by which education systems across different countries start to adopt similar policies, standards, and practices, often influenced by the guidance, norms, and pressures exerted by international organizations.

emphasis on continuous learning and the knowledge economy has emerged in global social policy (Apple, 2001; Zajda, 2018).

Scholars like Dale and Verger emphasise the significant impact of globalization on VET, which is increasingly influenced by the agendas rooted in neoliberalism from the developed Western world (Dale, 2000; Verger, Novelli, et al., 2018). Thus, scholars also indicate that in these currents of globalization, neoliberalism has thrived, becoming a prominent thread in modern educational ideology (Olssen, 2004; Davies & Bansel, 2007; Rizvi & Lingard, 2009a). Neoliberalism is a broadly defined paradigm of political-economic practice that advocates for free markets, free trade, and property rights, with the state's role confined to ensuring such freedoms (Olssen & Peters, 2005). The characteristics of neoliberal policy and practice have been deregulation, privatization, and the associated disengagement of the state from social service (Apple, 2009). Questions of power and subjectivity shape the actions of multilateral organizations, with critics contending that these organizations are led by a neoliberal worldview at their base and that the policy recommendations reflect the perspective by advocating reforms based on market or quasi-market principles (Lauglo, 1996; Edwards & Klees, 2014; Edwards, 2018b).

Thus, critical literature on VET policy indicates that the rise of a neoliberal and neoconservative education policy has dominated vocational education reforms worldwide, redefining education and training as an investment in human capital (Schultz, 1961) and human resource development (Zajda, 2018). According to this model, developing a workforce capable of meeting the varying requirements of the labour market is a goal that VET providers are financially rewarded for seeking to achieve (Witt, 2018). Through the major reforms, VET schools are required to compete on a worldwide basis in order to produce the workforce that entices global industry to locate in their region. Individuals are forced to adapt to labour mobility through retraining and lifelong learning to meet the immediate but evolving demands of business organizations, which some scholars argue greatly affects disadvantaged and vulnerable groups the most (Witt, 2018).

The literature on human capital theory examines the benefits of education and training, with analyses influenced by both agency and structural perspectives (Tan, 2014). According to scholars who support the human capital approach, education and training increase organizational productivity by conveying useful

knowledge and skills to employees, which also improve their socioeconomic status, career opportunities, and income, that ultimately contribute to boosting overall economic performance (Becker, 1976; Becker & Hecken, 2009; Zajda, 2018). However, critics of this model claim that human capital theory's persistent dominance as a social, economic, educational, and vocational paradigm is problematic because it ignores the significance of education outside of employment (Klees, 2016). The idea has been attacked for its domination of economic perspectives in education and training policies, its image of education as a defensive mechanism to deal with market instability, and its delusory belief that education can fix any sort of problem on its own (Hodkinson et al., 1996; Coffield, 1999; Field, 2000).

It should be noted that international organizations, in their quest to foster VET systems' growth in developing countries, often package neoliberal policies into comprehensive reform programs (Davies & Bansel, 2007; Rizvi, 2007; Rutkowski, 2007). Such global education policies, including lifelong learning, competency-based curricula, and national qualifications frameworks, reflect a broader political and economic strategy shaped by the 21st-century global landscape. The lifelong learning paradigm, for example, has recently been characterised as the core element of IO's global education policy, which was intended to function as a cure for the increasingly challenging economic situation and demographic constraints coming from ageing and diminishing population (Jakobi, 2012; Kersh & Huegler, 2018; Holford & Milana, 2023). Lifelong learning (LLL), as promoted by international organizations such as UNESCO, the OECD, the EU, the World Bank, and others, has evolved from a regularly occurring topic in educational, policy, and entrepreneurial discourse to an 'overarching educational reform policy intended to address a wide range of issues' (Lee et al., 2008).

Although the idea of lifelong learning can be traced back to Eduard Lindeman's critique of the education system in 1926 (Brookfield, 1984), it first appeared on the global agenda in 1949, when UNESCO hosted the International Conference on Adult Education in Denmark, with the main focus being adult training (UNESCO, 1949). Scholars indicate that the current LLL, with its human capital approach, is increasingly associated with continuing education and, particularly, with vocational training, and this case leaves out the profound social changes that have occurred in society (Field, 2006; Holford et al., 2008). Some academics argue that such remarks reflect policy trends over the last few decades, which have resulted

in a 'vocationalisation'¹¹ of all educational provision from school to university, to the point where 'economic' purposes of learning take precedence over the broader intellectual, social, and cultural functions of education systems (Connell et al., 1994; Avis, 1996; Hyland, 2007).

As previously indicated, a prevalent trend in global VET policies is the prioritization of accountability, competitiveness, performance, and efficiency - often with a focus on human capital and skills - which can potentially diminish the emphasis on citizenship, equity, and social justice (Davies et al., 2005; Banks, 2017; Akkari & Maleq, 2020). Considering the contemporary environment of globalization, in which political and economic factors tend to guide economic and social change, important international players' education policies reflect principles of competitiveness, efficiency, and accountability rather than equality or social justice (Carnoy, 1999; Peck & Tickell, 2002). As UNESCO's humanistic educational model, which was once so dominant in the 1960s, began to wane, "the economic and techno-determinist paradigm of the International Monetary Fund (IMF), the World Bank, and the Organization for Economic Cooperation and Development (OECD) gained dominance" (Zajda, 2015; 2020, p. 294).

Interestingly, vocational education policies were also utilised to address the consequences of these policies (Boeren, 2019), however with the underlying concept being that individuals are responsible for constantly retraining to meet the complexities of labour market needs, and VET is endorsed as a way for individuals to protect themselves against the risk of unemployment and to reskill when it occurs (Witt, 2018). In the contemporary paradigm, VET institutes have also been held more responsible for their ability to train a productive worker by providing certificates and degrees that are connected directly to increasing employer requirements. Scholars refer to this phenomenon as the 'educationalization' of unemployment', and they argue that VET is being used as a crisis management strategy, allowing governments to reflect on the specific symptoms of the problem while failing to address the structural root causes of the problem which is the poor labour market opportunities (Rasmussen, 2014; Valiente, Capsada-Munsech, et al., 2020).

¹¹ According to UNESCO TVETipedia Glossary vocationalisation refers to efforts by schools to include in their curriculum those practical subjects which are likely to generate among students some basic knowledge, skills and dispositions that might prepare them to think of becoming skilled workers or to enter manual operations

Hence, one of the most significant areas of debate in this global policy agenda surrounding VET is the accent for employability (Witt, 2018). The term “employability” refers to a set of skills essential for a competitive workforce in a worldwide labour market. In this emerging global policy debate, governments and policymakers are motivated to distinguish this vision of employability as the primary aim of VET, with little, if any, focus on larger functions of social integration, personal development, or civic engagement. Furthermore, institutions as well are being made accountable for their capacity to train a competitive workforce (Bartlett & Pagliarello, 2016; Calonge & Shah, 2016). Figure 5 illustrates the building blocks of global education policy in the 21st century.



Figure 5 Main elements of global education policy in VET (Author-created)

It is important to recognise that IOs often promote global education policies originating from particular national initiatives, like school-based management in the UK or charter schools in the US. These practices are then spread worldwide by policy entrepreneurs, mainly of Anglo-Saxon background (Verger, Novelli, et al., 2018). These entrepreneurs are pivotal in championing these global policy solutions. The domain of global education is now supplied with a multitude of policy entrepreneurs competing to capture the attention of policymakers towards the educational challenges they pinpoint and, importantly, towards the effectiveness of their suggested solutions in tackling these problems (Verger & Fontdevila, 2023). Typically, the success of policy ideas depends less on their intrinsic logic and more on how they are presented to policymakers, affecting their decisions to embrace or dismiss a proposal (Robertson, 2012; Verger, 2014).

To make global education policy appealing, international organizations need to clearly and concisely articulate new policies, convincing countries of their practicality, budget-friendliness, and administrative alignment (Kingdon, 2003; Béland, 2016b). Policy entrepreneurs frequently highlight the cost-effectiveness and efficiency of the policies they advocate. However, the strategy of employing persuasive framing can, at times, result in tensions with the standards of academic honesty. In their efforts to effectively promote their initiatives and depict them as appealing, policy entrepreneurs might sometimes oversimplify intricate realities (Ball, 1998) or resort to different logical fallacies and rhetorical shortcuts (Verger, 2012).

4.5 Motivations for Transferring Global Education Policies

The initial focus of this chapter was on examining existing literature to identify the key global actors influencing VET policies and delving into the mechanisms and tools through which these policies are disseminated. Following this technical exploration, the discussion shifts towards a more theoretical analysis to understand the reasons and motivations behind policy transfer. This involves a critical examination of literature that explores the perspectives of both international organizations and individual countries and acknowledges the multifaceted reasons for adopting these policies. While the initial section provides a detailed description of the dissemination tools, the latter part critically assesses the factors driving policy transfer, highlighting the complex interplay of motivations and influences in the global VET policy landscape.

4.5.1 Global drivers of policy change

Understanding the influence of IOs on a country's VET policy requires examining the literature on how both internal and external factors shape policy change. Two key meta-theories attempt to explain this influence: neo-institutionalism, which uses the Common World Educational Culture theory to explain policy transfer, and international political economy, which views IO influence as a consequence of economic globalization and capitalism (Dale, 2005). Both perspectives highlight the importance of supranational forces, the possibility that external influences on national education policies can affect policy goals as well as policy processes, the "capacitating" rather than "impact" nature of supranational forces' effect on national educational systems, and the recognition that national interpretative frames are supranationally, as well as nationally shaped (Dale, 2000). However, the focus of these concepts on education policy or specific forms of education

reform is not whether state policy is exogenously influenced but the fact that the state itself is an exogenously constructed entity (Verger, 2014). In other words, globalisation is not an external force that influences changes in nation-states; rather, globalisation is a singular platform or context where nation-states play by the commonly agreed rules. So, educational changes should be better understood as being embedded within interdependent local, national and global political economy complexes (Novelli & Lopes Cardozo, 2008).

Common World Educational Culture

The central tenet of the Common World Educational Culture (CWEC) concept is that international models of education, state, and society have a greater impact on the formation of educational systems and policies than different national elements. The role of nation-states (its institutions) in this framework is mainly to pursue modernity that is culturally and historically associated with the Western World. Scholars who support this viewpoint claim that in order to be viewed as legitimate (progressive and modern), national governments are subjected to and then accept policies endorsed by international entities such as the World Bank or the EU (Meyer et al., 1997; Ramirez et al., 2016). CWEC notion gets its theoretical underpinning from the World Culture Theory, the core thesis of which is that the nation-state's institutions and the state itself should be viewed as primarily formed at a supranational level by a dominating world (or Western) ideology rather than as independent and distinct national formations (Dale, 2000; Valiente, Sepúlveda, et al., 2020). Key features of Western ideology, or modernity, include the concepts of progress, justice, individual rights, and the importance of the state. In other words, this theory claims that the modern form of government and its institutions are established in the West, so the institutional formations, as well as policies these institutions enact even in the individual countries, are inevitably influenced by the Western ideology, which is grounded on progress and modernity.

According to world society theorists, a global model of education has expanded throughout the world as part of the development of a more general, culturally embedded model of the contemporary nation-state (Levitt, 2003). The necessity for nation-states to adhere to a global model of the rationalised bureaucratic system has resulted in institutional isomorphism and convergence (Drezner, 2001). The process of education expansion in this stage was consistent with the building of a modern state through the establishment of sovereignty and the building of a modern nation that is composed of individuals (Meyer et al., 1997). In other words,

to be regarded as a modern and progressive state, countries must comply with prevailing educational systems to achieve modernization. As a result, as neo-institutionalist scholars claim, education is globalised in a universal transnational cultural milieu, which also explains the seeming global convergence of educational conceptions since the educational system is embedded in a world society (Dale, 2000).

Although the CWEC theory is mainly a cultural and political thesis in its content rather than educational, it is widely utilised to explain the transfer of education policies in comparative education. However, scholars also indicate obvious limitations of the theory, such as the fact that it stays short of explaining the policy transfer phenomena comprehensively (Dale, 2000; Carney et al., 2012; Steiner-Khamsi, 2021). Since the CWEC provides a structural or a meta-explanation of global phenomena, it does not cover the role of agency in the process. In other words, it does not explain the motivation of policymakers to adopt or reject certain policies. According to this approach, the agency in this framework is a multilateral organization that plays the role of delivering the main recipe for modernization or progress (Robertson & Dale, 2015). This approach disregards the role of policymakers in the policy adoption process while at the same time ignoring the complex configuration of power balances and stakeholder interests.

Another drawback of CWEC is that it does not fully account for how nation-state policymakers interpret and adapt global education policies (Robertson & Dale, 2015). In other words, the policymakers may choose to borrow certain policy ideas; however, the semiotics behind those policies cannot be explained by simply looking at the original meaning that was given in the 'place of birth' or even by the multilateral organizations during its formulation. In other words, this theory does not explain the recontextualization phase after the policies were borrowed and shifts in meaning took place.

CWEC theory is also unable to explain the divergence in policies within similar settings (Carney et al., 2012). Accordingly, if educational policies become institutionalised globally, a likely outcome is the adoption of increasingly standardised systems of regulation across nation-states. However, the theory cannot particularly unpack why national variations of education policies remain strong even in close geographies or similar cultural and political systems (Levitt,

2003). Finally, CWEC theory does not consider or recognise the economic influences typically attributed to globalization (Verger, Novelli, et al., 2018). A narrow explanation through cultural lenses does not thoroughly explain the important decisions of policymakers, such as financing and adjusting the content or structure of education.

Globally Structured Agenda for Education

The Globally Structured Agenda for Education (GSAE) theory identifies the international political economy as the key driver of globalisation, recognises the evolving challenges of the global capitalist economy and attempts to assess its impact on educational systems, even as it is implemented nationally (Dale, 2000). Policymakers, according to supporters of this theory, make educational policy decisions based on international economic and political issues (Sung et al., 2000), and the active engagement of multinational stakeholders is seen as crucial for the success of national-level reforms and institutional changes (Edwards & Moschetti, 2021). According to this theory, the most significant way globalisation affects education policy is through altering the structural conditions under which education reform occurs, such as how reform is framed and viewed as required by policymakers (Verger, Novelli, et al., 2018).

Globalization, according to GSAE, is a set of political-economic arrangements for the global economy's organisation, motivated by the necessity to preserve the capitalist system rather than any set of principles or values. Political economic leverage and the perception of self-interest drive conformity to its ideas. Within the GSAE approach, capitalism is understood as a major influence in shaping global policy. This means that an actor's motivations can include the desire for profit, whether it is direct financial gain or indirect economic benefits for the stakeholders involved in the policy process (Dale, 2000). Consequently, GSAE looks for the driver of change at the supranational level in the changing character of the pursuit of profit. However, The GSAE method does not assert that material considerations alone drive change, but it may recognise that ideas and values change since capitalism can thrive in a variety of normative cultures (Dale, 2000). The primary focus of the GSAE approach lies in establishing a clear connection between shifts within the global economy and the resulting transformations observed in educational policy and practice (Verger, 2014).

Although GSAE lays the foundation for explaining the policy transfer phenomena and motivations of policymakers to apply for global education policies, there are some aspects that it is not able to clarify. Firstly, since the globally structured agenda approach is built on the capitalist economic system of establishment, it is not able to explain the policy transfer pursuit of non-capitalist countries or other forms of political and economic systems. Furthermore, beyond the contradictions of capitalism, it does not have a sufficiently developed account of agency or of the basis of social change that, except for the drive for profit, can explain the policy transfer motivations of the actors (Robertson & Dale, 2015). Finally, it is mostly focused on material factors, and it does not address the cultural and ideational aspects of policy change from the aspect of interrelation between society and the state (Verger, Novelli, et al., 2018).

4.5.2 National drivers of policy change

Overall, because the reason for the adoption of certain policies is unique and depends on many factors, this study does not generalise the reasons and motivations to transfer policies for determined reasons and mentions every single case study that is identified as a supporting factor. Nevertheless, it is acknowledged that the literature suggests that policymakers often employ a bifurcated approach in their education policy discourse, articulating one narrative to local stakeholders and another to international donors. This dual discourse strategy involves adopting the language of international reform to secure funding while prioritizing their reform agendas upon receiving these funds, thus continuing with 'business as usual' (Steiner-Khamsi, 2004; Steiner-Khamsi, 2010).

This phenomenon points to the spread of a global policy language rather than the actual adoption of global policies, casting a sceptical light on the impact of globalization on policy change and countering the view that developing countries are merely passive recipients of global policies. Similarly, as Martens and Wolf (2009) highlight, policymakers may strategically use the global policy arena to push for specific reforms. Thus, this engagement is aimed at reducing transaction costs associated with problem-solving and policy-making, as well as at leveraging domestic policy changes. This perspective suggests that global policy recommendations are strategically employed by policymakers for legitimization and to reduce domestic resistance, emphasizing the instrumental use of global guidelines in domestic policy discourse.

In this light, two concepts that were analysed before (CWEK and GSAE) laid the ground to understand global factors of policy borrowing (cultural and economic), but they do not clarify the complex interplay between global and national players in the transfer process and emphasise the domination of global forces over nation-states. Because the process of converting simple ideas into policies is complicated and necessitates a careful examination of the political context in which the idea was articulated, injected, and accepted (Stone, 2012), the analysis of the phenomena should reflect a “move away from thinking of policy transfer as a form of technology transfer or dissemination, rejecting the linear transfer of ideas” from one entity to another (Freeman, 2009, p. 429). Focusing on domestic drivers of policy change is essential for understanding how global education policy ideas are contextualised and adapted at the nation-state level (Verger, Novelli, et al., 2018).

Moreover, although globalization presents common features around the world, it is not an absolute project with identical effects in all places (Kassem et al., 2006). Thus, globalization's impact on education policy is shaped by a nation's unique history and political landscape, as well as the dynamic interplay between global forces and local contexts, among other factors (Verger, Novelli, et al., 2018). Literature on policy transfer stresses that transferred policy ideas are modified, indigenised or resisted as they are implemented in the recipient countries (Phillips & Ochs, 2003; Steiner-Khamsi, 2006) and consequently, global educational reforms tend to develop into multiform policy patterns (Schriewer, 2012).

Motivations of Receiver Countries

Although the first section of this chapter is about international organizations' influence on policy decisions, it should also be noted that the key actors of transfer are governments and the legislature in countries. So, the policy transfer model assumes that a government or legislature makes decisions based on information gathered from elsewhere, and they are expected to process information systematically but also bounded by the political, ideological and cultural constraints that encompass them (Gilardi & Wasserfallen, 2019).

Hence, the discussion in the literature about motivation to transfer policies is usually formed around structure agency debate, discussing whether societal structures or individual actions (agency) play a more critical role in shaping human behaviour and social outcomes (in this case, policy decisions). Proponents of structure emphasise the power of social systems and norms in determining

behaviour, while advocates for agency stress the capacity of individuals to act independently and make choices (usually rational) (Evans, 2019). Most transfer studies, either through explicit theoretical statements or implicit assumptions within their empirical models, suggest that policymakers adopt external policies either through a process of rational learning from other examples or in response to economic incentives driven by competition or coercion (Gilardi & Wasserfallen, 2019). The idea that policy learning is heavily mediated by politics is a notion that is explicit in policy transfer as defined by Rose (1991, 1993). Policymakers can hold significant biases for or against policies that contradict their ideologies. This bias may make them unwilling to learn from successful examples and more likely to take cues from co-partisans than from governments controlled by opposing parties (Butler et al., 2017). Gilardi (2010) shows that policymakers do not just learn from the direct effects of policies but also from their political implications - particularly those with electoral consequences. Further, this information is processed through ideological perspectives that shape how it is interpreted. As a result, and somewhat counterintuitively, ineffective policies can achieve a high degree of dissemination. This is often because policymakers are as concerned with the political repercussions of their choices as with the policies' real-world effectiveness (Shipan & Volden, 2021).

It is also acknowledged that the influence of globalisation on states is determined by how agents inside that state perceive it (Abdelal, 2009). Thus, when transferred, global policy concepts are continually and actively reinterpreted and modified by a variety of political actors operating at various scales, including national and local, according to their respective symbolic frameworks and institutional arrangements (Verger, 2014). Furthermore, any explanation of action, such as decision-making, must include both subjective and objective components to this action. Consequently, contextual and environmental impacts must be objectively determined and causally explained, but human meanings must be subjectively seen and hermeneutically grasped (Archer & Tritter, 2000). In other words, there is an intrinsic hermeneutic aspect to studying policy transfer, which implies that agents issue the meaning to certain concepts but also institutional design in every country as an objective element where these agents play their roles.

As previously noted, structural explanations of policy transfer and policy change point to economic and material factors that affect the process (Béland, 2016a).

Materialist researchers who take a positivist approach to the policy transfer phenomenon project government preferences over outcomes onto material truths, emphasising the rational, goal-oriented pursuit of policies as the key causal process in economic policymaking narratives (Abdelal, 2009). The prevailing view of this concept is based on System theory, which is the fundamental approach to understanding policymaking (Grin & Loeber, 2006). In essence, the system model depicts the policymaking process as a "conveyor belt" where pressures from society are transformed into inputs (demands and supports) for the political system, and consequently, politicians address these issues by developing certain policies (Grin & Loeber, 2006).

Rational choice theory

Similar to System Theory, one of the most commonly utilised theories in academia to explain policy process is Rational Choice Theory (RCT) (Archer & Titter, 2000; Herfeld, 2020). Simply put, RCT is the study of political behaviour based on the simple premise that political actors are instrumental, self-serving utility maximisers. It is linked to positivism and naturalism, in which political behaviour is based on a set of idealised mathematical models. These models appeal to policymakers because they may provide a predictive science of politics that is lean in its analytical assumptions, rigorous in its deductive reasoning, and broad in its seeming applicability (Hay, 2004a).

The core of the RCT is based on the same assumptions that are highly used in neoclassical economics, which claim that ideas have power as lenses that concentrate policymakers on the "best option" for maximising their interests (Verger, 2014). This approach opts for an efficient supply of services and empirical evidence for the decision-making process, mostly reflected by numbers and enforced by analytical mathematical models or as previously indicated by evidence-based decision-making. Hence, actors involved in policy interactions at various scales, according to this theory, are goal-oriented and engage in strategic decisions to maximise their utility based on measurable evidence (Risse, 2000).

In terms of policy adoption, rationalism would predict that local policymakers would choose global policies because they work or have worked well in the past to solve similar problems. As a result, policymakers would be viewed as well-informed rational actors who adopt globally tested policy options to improve their education systems' performance. In other words, policymakers are assumed to be

rational actors who strive to "provide the best with limited resources" and are "concerned with the equal distribution of gains associated with educational development and provision" (Psacharopoulos, 1990, p. 371). The same logic can also help interpret the motivation of multinational institutions and assistance agencies to engage with local communities in policy dialogues. At the core of this dialogue is the intention of the multinational institutions to help the policy community choose the best policy option that has a track record of success elsewhere (OECD, 2007). In essence, the theory is completely agnostic about what substantive goals one should pursue but attempts to simulate how individuals optimise their net utility within the restrictions of cost, time, knowledge, effort, etc.

Nevertheless, this theory largely neglects the 'dilemma of subjectivity and objectivity' because of its ontological disparity with the positivist approach. At the core of this dilemma is the recognition that agents' qualities and powers are subjective, referring to their ability to enforce meanings to certain concepts and act in response to them, but the 'parts,' which make up their organised environment, have objective properties and powers that restrict and permit activity (Archer & Tritter, 2000, p. 4). Hence, this theory focuses on objective parts of the decision-making without further investigating or explaining the subjective inputs by the agents (apart from their self-motivation of profit).

Furthermore, the theory also has significant drawbacks in explaining the choice of policymakers to apply and transfer policy ideas elsewhere because it only relies on the rationality of human decisions. The assumption of rationality assists in making political behaviour predictable in any given situation, which is accomplished by removing the indeterminacy that human action otherwise introduces into social systems. In other words, if individual behaviour can be presumed rational and an actor's utility function can be described, then that actor's behaviour in any given political environment becomes completely predictable (Hay, 2004b). Additionally, an assumption that there is only one reasonable path of action in every given situation, which is mainly formulated by the structure of the context rather than by human activity, is also troublesome (Dunleavy, 2014). This situation neglects the inherent unpredictability that human action brings into the social system since agents are inherently unpredictable (Gamble, 2000). Rational choice rejects agency, indeterminacy, and hence the

complexity of social and political institutions since it is based on the construction of predictive/explanatory models of human behaviour (Hay, 2004b).

Constructivist theory

In opposition to RCT, ideas as autonomous elements have a larger influence on policy development through Constructivist Theory. One of constructivism's key assumptions is that actors' interests and preferences are socially constructed rather than objectively determined (Haas, 2004). The constructivist theory employs ideas more explicitly as explanatory variables in contexts when policy change occurs, defining actors' preferences "by prescribing causal patterns or giving strong ethical or moral motives for action" (Goldstein & Keohane, 1993, p. 16).

In general, constructivism is a social analysis approach that emphasises how shared understandings and ideas shape the social world. It claims that ideational elements, not only material ones, affect human interaction and that the most significant ideational factors are widely shared or "intersubjective" beliefs, which cannot be reduced to individuals, as well as these common beliefs build the goals of purposeful agents (Abdelal, 2009). Constructivism focuses on what is referred to as "social facts" that have no actual existence but exist because people collectively think they do and act on them (Searle & Willis, 1995).

Constructivist analysis is concerned with understanding how social facts evolve and how they impact politics. Constructivists place less emphasis on purely rational behaviour, whether it is the result of bargaining between nation-states committed to promoting their interests or the interaction of groups acting in their own interests. The main idea behind the constructivist theory is that individuals not only create but also are shaped by the institutions in which they participate, and this relates not only to national but also to macro-level multilateral institutions that any country is part of (West, 2013).

Nevertheless, a primary drawback of Constructivist theory in explaining the policy transfer process is its inability to offer concrete predictions about political outcomes that can be independently tested in social science research. While the theory provides a valuable framework for understanding the nature of social life and social interaction (similar to rational choice theory), it does not make specific assertions about the precise content or results of these interactions (Finnemore & Sikkink, 2001). The substantive specification of actors and utilities is outside the

analysis of constructivist theory. The concept of agent-structure duality helps explain macro-level political dynamics. However, to analyse the motivations of individual agents or the detailed mechanisms of institutions, additional theoretical lenses are required (Finnemore & Sikkink, 2001). Thus, constructivist theory does not give substantial explanations of political behaviour unless it is combined with a clearer understanding of the players, their motivation and the content of the social systems they are part of (Finnemore & Sikkink, 2001).

Nevertheless, constructivist theory highlights the ideational process, which is very important in the study of policy transfer. Ideational processes in the policy process cover a wide range of subjects, including culture, framing, political ideology, and policy paradigms. Ideas in the policy process can be defined as the changing and historically constructed ‘causal beliefs’ of individual and collective actors (Peters et al., 2022). These beliefs, taken broadly, encompass policy actors’ values and perceptions (Béland & Cox, 2011; Béland, 2016a). Understanding ideational factors in policy change helps to identify how assumptions about the natural, social and political environment change or remain stable over time and how these ideational constructions shape the decision-making process and the political fights over various social policy issues (Radaelli, 2023). The logic behind the ideational explanations assumes that “someone arrives at an action only through one interpretation of what is possible and/or desirable’ through contingent historical constructions such as cultural beliefs and political ideologies” (Parsons, 2007, p. 13).

Therefore, ideas exercise power as qualities embedded in a wide range of organizations, including international regimes, value systems, and policy paradigms (Verger, 2014). It is assumed that ideas are part of larger, typically stable ideational frameworks that limit the ability of local policymakers in decision-making processes (Béland, 2016a). Accordingly, the belief systems (ideational framework) influence policymakers’ actions and preferences, generating common assumptions about how the world works, the nature of issues, and the key policy tools at their disposal to address them (Campbell, 2021). This also includes biases in decisions that arise from the manner in which policymakers draw on prior experiences and experiences from other domains through associative reasoning, memory reconstruction, and the anchoring of incremental reasoning in a certain starting point (Schneider & Ingram, 1988).

To summarise, constructivists believe that policymakers do not have perfect information when making policy decisions and that their understanding of education policy topics is likely to be impressionistic and imperfect, contrary to the rationalist premise (Hay, 2001). Looking from this perspective, according to constructivist theory, global policies are widely embraced, not because they are the best option, but because they are embraced by key decision-makers (Verger, 2014). Nevertheless, recognition of the importance of the power of ideas is the strength of constructivist theory. It should be noted that this study also attempts to understand education policies globally, as well as the study of the complex relationships between global ideas and their dissemination and re-contextualization in local settings (Ball, 1998).

Transitology

To gain a deeper understanding of decision-maker motivations, another important concept that this study should be related to is to locate this case study in “transitions” literature (Cowen, 2000; Silova, 2009). This framework is particularly relevant due to the nuanced contextual specificities of Azerbaijan, which are demonstrably influenced by the nation's historical trajectory. The study of political, economic, and social transitions (transitology) has significantly impacted how political scientists analyse the complex issues surrounding the collapse of the socialist bloc. This literature offers insights into the substantive, contextual, and methodological factors involved in post-socialist transformations (Silova & Magno, 2004). The “transitions” literature has delved into various aspects of post-socialist transformation and the role and motivation of actors in the process. This includes examining the roles of newly emerging democratic institutions and procedures (such as constitutions, elections, and legislatures), the influence of elites committed to democracy, and the complex factors necessary for consolidating these fledgling democracies (including socioeconomic, ethno-religious, and cultural issues) (Przeworski, 1991; Lijphart & Waisman, 1996; Greskovits, 1998). In this domain, comparative education literature often examines how educational policies shape national transformation, particularly where political and educational systems intertwine (Mitter, 1992, 2003). Cowen argued that the sheer volume of comparative education literature analysing how education influences political change warrants the creation of a distinct subfield known as “transitology” (2000, 2009). He defines transitologies as complex processes involving historical, political, economic, ideological, and sociological transformations. This complexity stems from the simultaneous breakdown and

rebuilding of state institutions, social and economic orders, and political aspirations.

Similar to trends in mainstream political science, comparative education research on educational transitions has frequently focused on a linear progression from authoritarianism to democracy or from communism to capitalism (Silova & Magno, 2004). McLeish (1998) outlines a five-stage framework for analysing educational transitions. This model tracks the evolution from authoritarian to democratic systems, encompassing ideological uncertainty, policy development, legislative changes, and school-level implementation. Though helpful for understanding transition as a phased process, the model does not fully address how education policies might evolve and be contested during change. It emphasises a fixed "democratic" end-point, potentially overlooking the fluidity of the transition process (Silova & Magno, 2004; Van der Walt, 2016).

On the other hand, the widening gap between the promises of post-socialist transformation and the realities experienced on the ground has led to growing scepticism about the very concept of "transition." This suggests that the initial optimistic discourse, which often implied a linear progression towards Western-style systems, failed to capture the complexities and potential for setbacks within these societies (Silova & Wiseman, 2010). Some scholars contend that the study of "transitions" within post-socialist contexts has become a reiteration of flawed modernization theories. They argue that this framework suffers from both intellectual inconsistencies and a failure to adequately address the political complexities and power dynamics inherent in societal transformation (Kapustin, 2001). As indicated by Verdery, this transformation could produce "a variety of forms, some of them perhaps approximating Western capitalist market economies and many of them not" (1996, p. 16). Pritchinn argues that existing theoretical models within the study of transitions are limited in their ability to explain or predict political transformation in former Soviet states. He calls for new models that better account for the unique characteristics of regional political systems (Пritchinn, 2021). As Karpov and Lisovskaya describe, educational "mutations" are "spontaneous, adaptive, and historically predetermined reactions of the already existing educational institutions to the new environment" (2001, p. 11).

In conclusion, the theoretical framework provided by transitology literature proves instrumental in elucidating the complexities of the relationship between

Azerbaijan and the European Union. Furthermore, this framework facilitates a nuanced understanding of Azerbaijan's ongoing transformation from a Soviet-era system to one aligned with Western paradigms. Notably, the reform of the VET system, as detailed in the context chapter, can also be conceptualised within this framework as a measure undertaken during this period of transition.

Research gap

The review aimed to explore the literature about the influence of international organizations on national education policies and identify the theoretical underpinnings of international policy transfer in education, analysing how and why global trends and international norms are transferred and changed within national contexts. Due to the limited academic literature specifically addressing post-Soviet Eastern European VET transformation, the review shifted focus towards understanding broader theories and debates on policy transfer and change.

As identified from this literature review, existing literature overwhelmingly examines how political and economic globalization shapes educational policy, highlighting the influence of international actors. While a gap exists in fully understanding how global forces interact with local decision-making during policy adoption, there's a growing body of research examining this interplay. Despite the analysis of policy stages, more attention is needed on the specific national context. Despite the external origins of many policy changes, there's a lack of research exploring the complex dynamics of negotiation, design, implementation, and assessment from the viewpoint of nation-states. This study bridges this gap by specifically focusing on the policy adoption stage, using a variety of theories and concepts uncovered in this chapter to understand the interplay between global influences and local decision-makers.

Moreover, as previously indicated, a significant gap exists within the literature on educational transitions in post-socialist contexts. While "transitology" concepts offer valuable insights, they often prioritise a linear Western-centric model of progression towards democracy and capitalism. This approach may overlook the unique complexities and potential for divergent outcomes within former Soviet states. These nations face the unprecedented challenge of navigating educational policy shifts in the wake of a collapsed socialist system while transitioning towards a capitalist economy. This study aims to bridge this gap by examining the interplay between inherited structures, global influences, and the realities of economic

transition as they shape educational policy adoption in a specific post-Soviet context. Through this focused analysis, the study contributes a nuanced understanding of educational change within this distinct historical and socio-political landscape.

4.6 Conclusion

This chapter critically examined the literature about policy transfer in education and aimed to identify gaps that this research would tackle. It began by identifying the key global actors in the education domain, focusing on their mechanisms and tools for policy dissemination. The discussion navigated through the complex landscape of policy transfer, exploring both the technical aspects of how policies are spread and the theoretical underpinnings of why this transfer occurs. By dissecting the motivations from both the IOs' perspectives and the receiving countries' viewpoints, the chapter laid a foundation for understanding the multifaceted reasons behind the adoption of global education policies. This groundwork sets the stage for a more detailed investigation into the building conceptual framework that aims to bridge the gap in the literature and tackle the main research question about the policy transfer case study, which is the focus of the subsequent chapter.

CHAPTER 5: CONCEPTUAL FRAMEWORK

5.1 Introduction

As previously indicated, the goal of the study is to identify the extent of the EU's involvement in VET sector reform in Azerbaijan by exploring factors that influenced Azerbaijani policymakers' decision to embrace particular EU-supported VET models. It also attempts to examine the instruments by which European policy measures and mechanisms in the field of vocational education and training appeared on Azerbaijan's national policy agenda, as well as to investigate and comprehend the contextual factors that influence national policymakers in their adoption or rejection of those policy measures. Although the research's major goal is to better understand the policy transfer relationship between the EU and Azerbaijan, it does so from the viewpoint of actors who participated in the process. This chapter follows up on theoretical discussions in the previous chapter, and using the main theories in the literature builds up a conceptual framework that helps to bridge the gap in academic literature and answer the research questions identified in the first chapter of this thesis.

5.2 Conceptualization

Firstly, it should be acknowledged that this study, given its thorough examination of academic literature and its multidimensional, interdisciplinary focus, does not seek to test any single theory or rely on one concept to address its research questions. In agreement with Langbein and Börzel's claim, who extensively investigated the EU's impact on policy change in various Eastern European countries, it is agreed that attempting to provide a coherent theoretical framework to elucidate disparities in policy change resulting from the EU's influence across different policy sectors and nations in the EU's Eastern neighbourhood is deemed premature at this stage (2013, p. 574). Langbein and Börzel suggest that more time and further studies are necessary to establish robust findings (2013). It is also the complexity and multidimensionality of the case that makes it difficult to be approached using only one theory or single theoretical framework. Therefore, instead of aiming to construct a definitive theoretical framework at this stage, this study attempts to develop a conceptual framework that integrates main theories from multiple perspectives to explore and elucidate the topic comprehensively.

Moreover, the literature review highlighted the analysis of policy change within a country, particularly when influenced by international organizations, which is

mainly carried out within the policy transfer lens (Edwards et al., 2023). It underscored the transfer of new policies from these international bodies, impacted by various multidimensional factors and emphasised the importance of a nuanced understanding of the multidimensional roles of both global and local influences, as well as ideational and material factors, within the cultural, political and economic context of the country when analysing the policy change process. However, the literature identifies a significant gap in scholarly research, where there are limited case studies that were based on the analysis of change that occurs within the evolving "education ensemble" or "education space" within the globalised world (Robertson & Dale, 2015; Toepper et al., 2021). Therefore, any examination of policy change and identification of policy transfer should facilitate a multidimensional analysis, which this study aims to achieve.

To position this study within the scholarly debate, firstly, the key elements of the conceptual framework that facilitate a thorough exploration of the research questions must be identified. The primary research question focuses on discerning the extent of influence exerted by IOs on nation-states. Conceptually, this influence can be understood as a measure of power dynamics between the two entities. Exploring the power relations between IOs and countries has been a widely discussed topic, as evidenced in the literature review of this thesis (Edwards et al., 2023). The most frequently utilised theories to explain influence and power relations between IOs and countries are the World Culture Theory and Political Economy theory. While a nuanced analysis of both theories was provided in the literature review, applying them to this case study necessitates the following arguments and explanations.

From the perspective of the World Culture theory, Azerbaijan, as a new nation-state, is drawn to European notions of modernity and culture to establish itself as a modern state (Levitt, 2003; Carney et al., 2012). The adoption of VET policies from the European Union (EU) reflects the Azerbaijani government's cultural, ideological, and political aspiration to align with Europe and become part of the European family. In this scenario, the EU's power over Azerbaijan is manifested through Azerbaijan's aspiration to either integrate politically and economically with the European Union or to be perceived as modern, progressive, and Western. Alternatively, when viewed through the Political Economy lens, Azerbaijan's inclination towards economic globalization and its pursuit of a capitalist system, aiming to integrate into the global capitalist society, drive its desire to adopt

policies similar to the EU (Dale, 2000; Zajda, 2015). In this context, the EU's VET policy, shaped by a neoliberal agenda emphasizing privatization and decentralization, serves as the ultimate model that Azerbaijan seeks to emulate in its new VET system. As reflected in the literature review, these two theories using a bird's eye view, recognise the dominating power of international organizations and, in our case, Europe over nation-states, Azerbaijan, and draw the explanation on a more global scale.

On the other hand, another set of questions for this research predominantly examines the phenomena from a national perspective, aiming to unravel the "hows" and "whys" of the process. As outlined in the literature review, both the theories mentioned above primarily scrutinise policy transfer from the dominant role of IOs to countries. While this dominance is yet to be conclusively identified within this study, it is imperative to recognise the involvement of other local actors, particularly local decision-makers, in the process. So, this study also aims to determine whether the decision to adopt the "EU model of VET" was a "rational choice" or a "social construct" that predominantly elucidates these decisions.

When applying Rational Choice theory to this case study, the adoption of the EU-influenced VET model is primarily explained as a decision by policymakers based on the belief that out of all the VET models worldwide, the EU model would be most adept at addressing the challenges faced by Azerbaijan (Verger, 2014). This implies that during the decision-making process, the government evaluated various alternatives not only within Europe but globally, conducting a cost-benefit analysis before arriving at the decision to adopt the EU VET model.

Conversely, the constructivist explanation for adopting the EU-influenced VET model posits that Azerbaijani policymakers were drawn to the promising ideas embedded within the EU VET model (Haas, 2004). Consequently, the notion that the EU's VET model, characterised by decentralization and a focus on labour market demands, resonated with policymakers as well as broader societal expectations and perceptions regarding the role of VET in society. According to the constructivist approach, both the emerging and traditional roles of VET within the education system should be embraced by key stakeholders and society at large. The conceptual framework should be constructed to facilitate analysis of both global and local influences, as well as material and ideational factors,

particularly as explanations emphasizing local dynamics are unpacked in subsequent chapters.

Apart from the global-local lens, the type of influence between the EU and Azerbaijan and mechanisms that were channelled to utilise this influence should also be accommodated in the framework. Hence, it has yet to be discovered whether there was a direct policy transfer from the EU to Azerbaijan, namely if there were coercive elements or if it was a voluntary borrowing of the ideas that appealed to local decision-makers. Alternatively, the types of indirect policy transfer (diffusion, emulation, competition), which were elaborated in the literature review, are yet to be identified. The conceptual framework should also allow for the identification of the factors that led to certain outcomes; namely, it should allow for the description of soft and material tools and mechanisms of influence between two entities. Hence, apart from the global-local lens, the framework should include material and ideational elements. Table 5 illustrates how the conceptual framework is designed to elaborate multi-scalar analysis that encompasses main theories that allow the exploration of the case from different dimensions.

Table 5 Main theories included in the conceptual framework

| | Internal | External |
|------------|------------------------|---|
| Material | Rational Choice Theory | Globally Structured Agenda for Education Theory |
| Ideational | Constructivist Theory | Global Common Educational Culture Theory |

5.3 Policy adoption

It is recognised in the literature that IOs wield significant influence over countries primarily through their capacity to set agendas on a global scale (Edwards et al., 2023; Verger & Fontdevila, 2023). For instance, practices such as highlighting the policies of 'high-performing' countries or regions as benchmarks for others to emulate, conducting peer reviews where organizations like the OECD provide recommendations for system improvement, and engaging in transnational communication for lesson-drawing and policy promotion are all examples of agenda-setting practices by IOs. However, this study transcends mere agenda-setting and delves into the analysis of how the EU influences policy formation at the national level. Consequently, this study conceptually focuses on the policy

adoption phase of policymaking, traditionally perceived as the sole prerogative of countries but increasingly influenced by global forces, as indicated by the literature review conducted for this study. So, an additional lens of the framework should encompass not only agenda setting but also the adoption and recontextualization of policies. Hence, as Gilardi and Verger recommend, focusing mainly on issue-definition and policy adoption stages would help to consider political processes more explicitly (Verger, 2014; Gilardi & Wasserfallen, 2019).

Policy adoption is a political act rather than a purely technical one where ideas and information are filtered via ideological perspectives (Gilardi & Wasserfallen, 2019). As indicated in the literature review, policymakers are concerned not just about what is effective but also about what is attractive to stakeholders. According to scholars, if policymakers see that a specific policy is acceptable overseas, they are much more likely to embrace it, regardless of the policy implications (Gilardi & Wasserfallen, 2019). Consequently, policy ideas filtered through political judgments are affected by viewpoints and focus on the political consequences of policy adoptions. This is why the issue-definition stage is critical because changing the framing of political arguments at this level can change policies long before they reach the adoption stage. According to Gilardi, policy transfer analysis should take into account political factors such as the electoral implications of policy adoption and how ideology distorts the perception of policy effects, which can impact policy dissemination (2019).

Furthermore, at the issue-definition stage, the parameters of the discussion are subject to “self-fulfilling prophecies and have a clear impact on policy adoptions” (Gilardi & Wasserfallen, 2019, p. 1252). So, because the process of converting simple ideas into policies is complicated and necessitates a careful examination of the political context in which the idea was articulated, injected, and accepted (Stone 2012), this study reflects a “move away from thinking of policy transfer as a form of technology transfer or dissemination, rejecting the linear transfer of ideas” from the EU to Azerbaijan (Freeman, 2009, p. 429). In other words, since policy change cannot be described entirely by external influence regardless of whether soft or hard power is used during the influence, domestic actor configuration and preferences are crucial elements to identify policy transfer aspiration in the context of EU - Azerbaijan relations (Langbein & Wolczuk, 2012). Overall, the focus on the policy adoption phase is justified by its enabling

factor of exploring cultural, ideological and political nuances in the policy change process.

Additionally, since the focus of this topic is policy transfer from IO to the nation-state, one of the angles that this study would contribute to is the identification of elements of convergence or divergence of policies. An examination of both convergence and divergence is warranted due to two key considerations. Firstly, bilateral agreements established between the EU and Azerbaijan explicitly outline the EU's expectation of harmonization within the regulatory framework (European Union, 1999). Secondly, the concept of convergence serves as a well-established tool within academic literature for measuring and analysing policy transfer processes (Bennett, 1991; Wollschlager & Fries Guggenheim, 2004; K  pplinger, 2011; Incaltarau et al., 2022). Both of these points are elaborated in the following chapters.

Convergence divergence debate is well-known in literature and highly adopted while analysing the policy transfer mechanisms between IOs and countries (Langbein, 2011; Langbein & Wolczuk, 2012; Delcour, 2013; Incaltarau et al., 2022). Neo-institutionalist and political economy researchers argue that globalization leads to the convergence of educational systems, fostering similarities in their structures, processes, and performance outcomes (Bennett, 1991; Verger & Fontdevila, 2023). However, it is also acknowledged that when researching the policy transfer from IOs to countries, it is problematic to reach straightforward conclusions on policy convergence (Hay, 2004a). Thus, it is acknowledged that although the identification of convergence or divergence focusing on policy adoption is widespread in academic literature, convergence cannot be reduced to the formal adoption of specific policies and policy instruments (Verger & Fontdevila, 2023). Thus, this study agrees with Verger and Fontdevila in their conceptualization of convergence as being more than transfer and formal adoption of a policy. Hence, although this study aims to contribute to the debate on convergence/divergence, it would not use the lens of this concept to measure the outcome of the policy transfer. Rather, this approach would facilitate the identification of the specific type of convergence applicable to this case study, as delineated within Hay's typology, illustrated in Table 6 (2004a).

Table 6 Hay's six types of policy convergence

| Type of Convergence | Description | Example in the Education Sector |
|-----------------------------------|--|--|
| Input Convergence | The alignment of pressures and challenges faced by political-economic regimes. | Many countries face similar challenges, such as the need for digital literacy in their curricula due to the global shift towards technology. |
| Paradigm Convergence | The harmonization of policy paradigms and cognitive filters through which challenges are understood. | Adoption of student-centred learning as a dominant teaching paradigm across various educational systems. |
| Policy Convergence | The adoption of similar policies in response to common pressures. | Implementation of standardised testing at certain education levels in multiple countries. |
| Legitimatory Rhetoric Convergence | The use of similar ideas to justify policy choices. | Emphasizing the importance of education for economic competitiveness to justify investment in STEM education. |
| Outcome Convergence | Performance indicators typically measure the alignment of policy outcomes. | Similar improvements in literacy rates following reforms in early childhood education. |
| Process Convergence | The standardization of the processes through which challenges are translated into policy outcomes. | The widespread use of evidence-based research to inform policy decisions in education. |

5.4 Policy Change Process

In this study, the policy is referred to as “decisions taken by political actors on behalf of the state” (Rizvi & Lingard, 2010, p. 4). This definition is important because it includes not only laws that a national government may pass but also those programs and projects agreed to between a government and the EU. Nevertheless, the concept of “policy change” is defined as a process of change in practices and institutional arrangements governing a particular policy (Langbein & Börzel, 2013). It is assumed that this change would be formalised in a certain normative document and would guide the regulatory mechanism concerning a certain sector. Hence, in this study, policy change occurred with the adoption of the Law on Vocational Education (2018). Although this is a simplified version of the definition of a policy change, a 'change' in line with this definition is more than just a financial, organisational, or administrative adjustment; it also leads to modification of the key policy features. This research operationalises the concept of policy change as indicated by Sabatier, who recommends combining both internal and external factors to identify policy change which would include the following characteristics when naming a shift as a policy change: (a) the

statement (and justification) of new policy objectives; (b) the modification of the policy reference frame; and (c) an evident shift in the underlying philosophical or ideational paradigms (Sabatier, 1998).

It is worth noting that political establishments and their embedded governance subsystems (institutions) are the major drivers of policy change (Howlett & Ramesh, 2002; Howlett & Cashore, 2009) and that "paradigmatic" change, defined as a fundamental reformation of most aspects of public policy, is widely accepted to occur only when governing institutions themselves are transformed (Walkenhorst, 2008). As a result, policy development (policy change) analysis must be historical in nature and span years (Walkenhorst, 2008). Furthermore, the change in the governance system is not limited to the organization's institutional structure or management process. However, it should also be represented in a major way in the organization's interactions with society in general, as well as how this change is viewed by society in particular (Grin & Loeber, 2006).

Summarizing the information provided above, it can be acknowledged that while policy change results from reform efforts, it necessitates more than mere modifications. To qualify as policy change, there must be legally binding alterations accompanied by a fundamental rethinking of the philosophical and institutional frameworks surrounding the policy area. Hence, conceptually, this study should not only position itself within the broader policy change literature that mostly focuses on relations and dynamics among IOs and nation-states, but it should also locate itself in the Transitology debate with the focus on post-socialist countries changing their political and economic systems and transitioning to a new paradigm (Silova & Wiseman, 2010).

5.5 Historical Institutionalism

Given the inherently historical nature of policy change analysis, employing a historical institutionalist approach fosters a deeper understanding of the educational reforms within the context of Azerbaijan's broader socio-political and economic evolution (Pierson & Skocpol, 2002). This framework facilitates an examination of how these reforms are connected to the ongoing development of the country's political, economic, and cultural landscape, with a particular focus on the education system. Historical institutionalism is concerned with the causes, development, and implications of policy events from national to global stages (Fioretos et al., 2016). This approach enables understanding the order and timing

of historical events to produce permanent legacies that shape the extent, nature, and consequences of governmental choices. Historical institutionalists argue a 'path-dependent' view of social causation, rejecting the idea that the relatively similar procedural factions will deliver the same results everywhere in favour of the idea that the outcome of such forces will be influenced by the characteristics of a particular scenario, which are frequently inherited from the past (Levitsky & Way, 2015).

Historical institutionalists use 'path dependence' and possible implications to explain the formation of systems, highlighting how the timing and sequencing of previous events tend to have long-term effects on the stability and dynamism of education systems (Fioretos et al., 2016). The term 'path' refers to an institution's or a complex institutional arrangement's long-term evolutionary route, which is influenced by and then further changed by collective actors (Ebbinghaus, 2009). The principles suggest that a window of opportunity for the agency to move into action during crises arise where collective agents adopt new rules (Ebbinghaus, 2009; Aziabah, 2018). "Critical junctures", as characterised by historical institutionalism scholars, are "relatively brief intervals of time during which there is a considerably increased possibility that agents' actions may impact the outcomes of issue" (Capoccia, 2016, p. 3). In other words, critical junctures are times of possibility when the typical limitations on action are reduced, allowing the agency to make decisions and take action (Aziabah, 2018). To put it another way, this viewpoint promotes the notion that past events have an impact on future occurrences (Mahoney, 2000).

Nonetheless, Archer's work on the interplay between institutional structures and actors is particularly important when it comes to core conceptions of historical institutionalism in comparative education research (Archer, 1979). In fact, her model of structural elaboration overlaps to a considerable degree with historical-institutionalist reasoning. Structural elaboration, according to Archer, is a process in which educational expansion is regarded as a series of phases, each of which is marked by distinct coalitions of important players while also pre-structuring the institutional framework for future coalitions and educational growth (Archer, 1996). Overall, a conceptual framework used in this research should accompany both identifying critical junctures and facilitating the analysis of multiscale factors influencing educational change, such as events, actors, and institutions.

5.6 Cultural Political Economy (CPE)

Analysing educational policy reform, therefore, requires a conceptual perspective capable of capturing the process in a historical manner within both institutional vision and processes of policy change, as well as an approach capable of explaining the political, economic and cultural aspirations in the adoption of different paths on vocational education and training (Dobbins & Busemeyer, 2015). Therefore, this study is conceptually based on the Cultural Political Economy approach that frames, on the one hand, external and internal settings, material and ideational factors, as well as political, economic, and cultural drivers that decision-makers are affected by both in the international and national arena. These factorial constraints shape the decisions of policy actors during the policy process (Verger et al., 2016). Furthermore, this approach facilitates the application and evaluation of relevant theories indicated in Table 5 (p.87) within the context of this case study. This process serves the dual purpose of enriching the analysis and situating the current research within the broader scholarly discourse.

The Cultural Political Economy is one of the conceptual methods to understand the ideational influences and material factors in policymaking. In essence, CPE, an approach designed to avoid the drawbacks of structuralism, reduces agents to passive carriers of self-replicating, self-transforming social structures and shortcomings of constructivism that social reality is reducible to participants' meanings and understandings of their social world (Jessop, 2010). Ontologically, CPE is framed on critical realist assumptions about the social world “comprised of various layers of structures and Globalisation, Societies, and Education generative mechanisms... so that the social world is also comprised of a stratified ensemble of structures and relations” (Robertson & Dale, 2015, p. 152).

In contrast to traditional political economic approaches, CPE understands the cultural shift as causally efficacious as well as meaningful, implying that semiosis not only helps to interpret real events and processes and their emergent effects but also contributes to their explanation (Verger, 2016). As a result, CPE emphasises the semiotic aspect of all interpersonal interactions by stressing the fundamental nature of meaning and meaning-making social connections (Jessop, 2010). With regards to policy choice, the approach defends the position that because the world cannot be comprehended in all its complexity in real time, actors must choose which elements of it to focus on in order to be active participants in it (Jessop, 2010). Thus, this framework allows for a more

comprehensive understanding of socio-economic phenomena, acknowledging that economic actions are not only driven by material conditions but also shaped by ideas, beliefs, and discourses. It provides tools to dissect how cultural narratives and ideologies influence economic policies and practices, enabling a nuanced exploration of complex issues that traditional economic analyses might overlook.

Overall, the CPE framework allows for a nuanced exploration of the dynamic interplay between global structures (such as the EU's policy frameworks) and local agencies (how Azerbaijani policymakers, institutions, and other stakeholders engage with and negotiate these influences). This perspective is crucial for addressing questions about the local adaptation of global policies and the factors that facilitate or hinder the implementation of EU-influenced VET reforms in Azerbaijan. Through its focus on the interaction between global economic forces and national political economies, CPE provides the tools to analyse how globalization and international norms shape education policies. This is key to understanding the pressures and incentives for Azerbaijan to align its VET system with EU standards and practices, thus addressing research questions related to the motivations behind adopting EU VET policies.

Additionally, CPE's critical approach enables the identification of contradictions and conflicts within and between economic, cultural, and policy realms. This can illuminate the challenges and tensions in harmonizing the EU's VET policies with Azerbaijan's national priorities and socio-economic conditions, offering deeper insights into the complexities of policy transfer processes. Also, building the research on CPE enables the analysis of the policy adoption and change via three fundamental evolutionary processes, including variation, which consists of the development stage of policy, selection where appropriate policies are determined and retention, where selected policy measures are formalised (Jessop, 2010; Verger, 2016).

The operationalization of the CPE framework is further elaborated in the Methodology chapter. The influence factors indicated below were identified by Verger et al. (2016), which allows us to unpack drivers of policy change. He indicates this list as potential factors that would affect certain decisions in a given stage of the policy change. While identifying the factors that led to policy change in the Azerbaijan case study, this list is further revisited. Thus, accommodating

the potential factors of policy change in the conceptual framework allows a more systematic analysis of the process.

5.7 Conclusion

In conclusion, the conceptual framework that is based on the Cultural Political Economy framework outlined in this chapter provides a foundation for examining the process of policy transfer from the European Union to Azerbaijan using the main theories in policy transfer literature. By weaving together theories from various perspectives and focusing on the interplay between global influences and local contexts, this framework sets the stage for a comprehensive analysis of policy adoption mechanisms. It enables the research to be conducted from a historical perspective and focuses on institutions and actors that play active roles in the policy adoption process. The forthcoming methodology chapter delves into the research design and explains how the developed framework is operationalised. It will detail the approach to data collection and analysis and the strategies employed to ensure the research's validity and reliability.

CHAPTER 6: METHODOLOGY

6.1. Introduction

The research design was rigorously constructed, taking into account the specific objectives outlined in the study and the established conceptual framework presented in the preceding chapter. Thus, by taking VET policy reform in Azerbaijan as a case study, methodologically, the goal is: a) shed light on the policy change process by identifying the main drivers that led to the reform; b) identify main institutions and actors, as well as updated policy paradigm and main policy mechanism in the VET sector formulated as a result of the reform; c) identify the extent of EU's involvement in the phases of policy adoption by zooming in the policy components formulated after the policy change.

This chapter outlines the methods used to explore the policy change process. In understanding the complexities of policy transfer, this study takes a leaf from prior scholarship that employed the Cultural Political Economy approach to explore similar phenomena (Sung et al., 2000; Verger, 2016; Zancajo, 2019; Valiente, Sepúlveda, et al., 2020). A significant departure here is the application of the historical institutionalist perspective, brought to life through a process-tracing case study method. As the primary research question focuses on identifying the key factors influencing decision-making, the historical institutionalist approach is employed. This method is well-suited to analyse the historical context and institutional structures shaping these decisions. However, the additional research questions delve deeper into the "hows" and "whys" behind the decision-making process, requiring a more nuanced approach. Therefore, the process-tracing case study method is implemented to provide a detailed examination of these dynamics. This chapter further elaborates on the rationale behind the chosen methodologies.

Hence, the study relies on a mix of primary and secondary data. This includes information from documents and interviews with key figures in the sector. Interviews were held with officials, policy influencers, and other important stakeholders. Alongside these, documents such as policy records, EU project papers, and state strategies were analysed. These documents offer a broad view of the VET reform, while interviews provide detailed insights into the factors behind policy decisions.

By using both documents and interviews, the research aims to provide a well-rounded understanding of the VET reform. This combination also helps improve the accuracy and trustworthiness of the study. In light of these considerations, the current research demands a research design that facilitates a comprehensive examination of the decision-making process, culminating in the identification of key factors that exert influence on such decisions. In general, the research design framework of this study is built based on the tools indicated in Table 7. The next sections unpack each component of the selected design.

Table 7 Methodological components of the study

| Research philosophy | Research type | Research method | Research strategy | Data collection method | Data analysis method |
|----------------------------------|---------------------------------|-----------------|----------------------------|------------------------|-----------------------------|
| Critical realism, interpretivism | Analytical deduction /induction | Qualitative | Process tracing case study | Documents, interviews | Reflexive thematic analysis |

6.2. Research Philosophy and Paradigm

Research philosophy and paradigms encompass a set of beliefs and assumptions guiding a researcher's methodology. These beliefs are rooted in the researcher's positions on ontology (the nature of reality) and epistemology (the nature of knowledge). Choosing an appropriate research paradigm is essential for any study, as it influences the research design, methods, data analysis, and interpretation of the findings (Hesse-Biber, 2017; Cohen et al., 2018). This study seeks to understand how and why EU policies and practices were transferred to and adapted within the Azerbaijani context, examining the interplay between global influences and local educational policy and practice dynamics. As indicated in the previous chapter, this research employs a Cultural Political Economy framework to explore these complex interactions, aiming to provide insights into the mechanisms of policy transfer and the factors that facilitate or hinder the adoption of EU-supported VET policies in Azerbaijan. In fact, the focus of the research is a policy change in the VET system which was embodied in the adoption of the Law on Vocational Education of Azerbaijan. The investigation is conducted to understand the interplay of certain factors that shaped this law as it is.

Three research paradigms that are commonly used in social sciences and education research are positivism, constructivism, and critical realism (Hesse-Biber, 2017, p. 21). Positivism assumes that there is an objective reality that can be measured and observed by using scientific methods. Positivists adopt a deductive approach, where they test hypotheses derived from existing theories or laws. Positivists

value quantitative data, statistical analysis, and generalization of results. Positivism is suitable for studies that aim to measure educational outcomes, compare educational systems, or test the effectiveness of educational policies or interventions (Hesse-Biber, 2017). However, positivism has been criticised for ignoring the complexity and diversity of educational contexts, oversimplifying the causal relationships between variables, and neglecting the role of human interpretation and agency in educational processes (Crossley, 2003).

On the other hand, constructivism, the foundation for the Constructivist theory discussed earlier, assumes that reality is socially constructed by human actors who interpret their experiences and interactions (Cohen et al., 2018). Constructivists adopt an inductive approach, where they generate new insights or theories from empirical data. Constructivists value qualitative data, thematic analysis, and contextualization of results. Constructivism is suitable for studies that aim to understand the meanings, perspectives, or experiences of educational actors, explore the diversity or complexity of educational phenomena, or examine the role of culture or context in education (Hesse-Biber, 2017). However, constructivism has been challenged for being too subjective and relativistic, lacking in generalizability and comparability, and failing to address the structural constraints and power dynamics that shape educational realities (Jung, 2019).

Alternatively, critical realism assumes that there is a real world that exists independently of our perceptions but that our knowledge of it is fallible and partial (Archer, 2016). Critical realists adopt an abductive approach, where they seek to explain the causal mechanisms or processes that underlie observable events or patterns. Critical realists value both quantitative and qualitative data, mixed methods analysis, and triangulation of results. Critical realism is often used in comparative and international education research that aims to investigate the causes or consequences of educational change, challenge or critique existing theories or policies, or explore the interplay of structure and agency in education (Robertson & Dale, 2015).

Therefore, this study adopts a combination of critical realism and interpretivism as its research paradigm. This means that it acknowledges both the existence of a real-world that influences educational phenomena and the role of human actors who construct their own meanings and interpretations of those phenomena. It also means that it seeks to uncover not only what happened in Azerbaijan's VET reform

but also how and why it happened by exploring the underlying causal mechanisms as well as the contextual factors that shaped the policy change process. Additionally, this research draws upon both numerical data and textual information from documents, interviews, and statistics, creating a comprehensive and well-supported foundation for its analysis.

6.2.1 Critical realism

Critical realism, as proposed by Bhaskar (1975), provides a philosophical stance that acknowledges a reality existing independently of our knowledge. It suggests that one can learn about this reality through observation and theorizing about the structures, mechanisms, and contextual conditions that may explain it (Wynn & Williams, 2012; Fletcher, 2017). This study embraces critical realism due to its stratified view of reality—comprising the domains of the real, the actual, and the empirical—allowing for an analysis that goes beyond observable phenomena to uncover the underlying causal mechanisms. This stratification is crucial, as it recognises that what occurs (the actual) and what is experienced or observed (the empirical) are outcomes influenced by the exercise of potentialities, or powers, inherent in the structures of reality (Bhaskar, 2008). As Archer points out, understanding individual motivations, desires, and strategies - the core questions of this doctoral research - requires examining the dynamic relationship between "concerns" and "contexts". "Concerns" encompass an individual's internal goals and priorities as shaped by their self-reflection. "Contexts" refer to the external social, economic, and cultural forces that an individual responds to and navigates. This interplay highlights how individuals are shaped by their environment while also actively shaping their own trajectories (2007, pp. 19-20).

However, combining critical realism and interpretivism also poses some challenges and limitations for the study. This study's methodological approach, integrating a critical realist ontology with a critical interpretivist epistemology, occupies a middle ground between two dominant paradigms. Critical realism posits an external reality that exists independently of our perceptions, while critical interpretivism emphasises the role of social construction and individual meaning-making in shaping our understanding of the world. This unique combination allows for nuanced analysis that acknowledges both underlying structures and the subjective experiences that shape how those structures are interpreted and acted upon (Fletcher, 2017). One challenge is to integrate both explanation and interpretation in data analysis and presentation. This requires the researcher to

move beyond description and provide contributing explanations for the observed phenomena, as well as acknowledge the role of interpretation and reflexivity in constructing such explanations (Sayer, 2000). Another challenge is to ensure validity and reliability in data collection and analysis. This requires the researcher to use various techniques (such as triangulation, validation, and replication) to enhance the credibility and trustworthiness of the findings and recognise the possibility of error or bias in data sources or methods (Hesse-Biber, 2017). A limitation of combining critical realism and interpretivism is that it does not provide a clear or prescriptive framework for data analysis and interpretation (Ackroyd & Karlsson, 2014). However, this leaves the researcher with a lot of flexibility and discretion in choosing and applying appropriate analytical tools and techniques, but also with a lot of responsibility and accountability for the quality and rigour of the analysis.

Although some researchers claim that “scientific research should be conducted without philosophical legislation” (Kemp, 2005, p. 171), this study acknowledges that since the research is a process rather than an endpoint, ontological and epistemological viewpoints are important for methodological consistency (Hesse-Biber, 2017). Adopting interpretivism as a research philosophy allows the researcher to comprehend the reality of the situation and analyse the case in more depth. In fact, the interpretivist's goal is to grasp the situations and provide rational and accepted explanations (Varey et al., 2002). The hermeneutic tradition, which seeks deep understanding by interpreting the meaning of interactions, acts, and objects, is related to interpretive techniques. This viewpoint contends that the only way to comprehend social reality is via the eyes of those who are immersed in it. If thinking is considered to be inextricably linked to the human condition, our perception of the social environment is rooted in our daily lives and existence (Heidegger, 1962). Thus, an interpretive paradigm is grounded in part on a subjectivist, interactionist, socially constructed ontology, as well as an epistemology that recognises various realities, agentic actions, and the significance of viewing a situation through the eyes of the players (Cohen et al., 2018).

Furthermore, because the purpose of this research is to understand the contextual factors that influence policymakers' decisions, it is assumed that these actors are meaning-making beings who actively construct their own meanings of situations, make sense of their world and act in it through such interpretations (Cohen et al.,

2018). Although both ideational and material factors are referred to as contextual factors, this research does not treat these factors in an ontologically dichotomous manner but rather assumes that both factors influence the decision equally, which should be identified as a result of the research. Consequently, constructivist ontology is required for this type of research, which assumes that people are deliberate, intentional, and creative in their actions and that meaning emerges from social situations, interactions, and negotiations and is handled through the interpretive processes of the humans involved (Cohen et al., 2018). Thus, constructivist ontology holds that the meanings employed by individuals to interpret circumstances are culture and context-bound and that there are various realities, not single truths, in interpreting a scenario. In other words, realities are multifaceted, constructed, and comprehensive, allowing for numerous interpretations, including those of all persons involved (Hesse-Biber, 2017). In contrast to the positivist perspective, constructivist ontology recognises that persons, situations, events, and objects are unique and have meaning imparted to them rather than having intrinsic meaning.

From an epistemological standpoint, this inquiry necessitates acknowledging, describing, and explaining the numerous and disparate perceptions of situations, as well as their distinctiveness, causes, and consequences. Understanding a phenomenon requires taking into account all components of the study rather than just a few. In this situation, research must examine relationships between elements in a larger system by focusing on subjective accounts, points of view, and interpretations of an event by participants as well as the researcher (Cohen et al., 2018). As a result, subjectivist epistemology necessitates hermeneutic approaches in research to identify and analyse the meanings that individuals assign to occurrences.

At the core of this research lies a fundamental interest in dissecting the power dynamics that characterise the relationship between the European Union and Azerbaijan. This exploration is driven by the critical recognition that both entities are not monolithic entities, but rather comprise a complex range of actors within their respective decision-making structures. The study acknowledges the existence of complex internal power structures at the micro, meso, and macro levels within both the EU and Azerbaijan. This intricate web of relationships and influences is precisely why the study necessitates a methodological approach

imbued with a critical lens, enabling a thorough dissection of the power relations at play.

Yet, the scope of the investigation extends beyond the mere identification of power relations between these entities. The crux of the research delves into the underlying factors that have shaped pivotal decisions. This inquiry is driven by research questions centred on understanding the 'why' and 'how' behind these choices, thereby necessitating an interpretivist approach. Such an approach is instrumental in this context as it allows for a nuanced understanding of the decision-making processes while also considering the researcher's own positionality within the investigative framework.

Moreover, the quest for understanding merely rests upon uncovering empirical evidence, whether statistical, textual, or discursive. Hence, the study embarks on a multi-faceted analytical journey, examining the process from various perspectives. This is in line with the Cultural political economy framework (Jessop, 2010), which demands a multi-dimensional analysis to capture the breadth and depth of the influences and outcomes under consideration.

In synthesizing these approaches, the research aims to construct a comprehensive narrative that not only chronicles power dynamics but also decodes the catalysts behind critical policy decisions. This methodological synthesis aligns with the overarching goal of the study: to offer insight into the complex interplay of cultural, political, and economic forces shaping the VET reforms within the context of EU-Azerbaijan relations.

6.3. Research Strategy and Approach

This research relies on the case study approach, a methodology that offers an in-depth exploration of specific phenomena. Such an approach allows for a rich, detailed investigation, shedding light on the intricate aspects that might otherwise remain obscured in broader studies. Case studies emphasise comprehensive understanding, prioritizing context over isolated variables, which is particularly important in subjects as complex as policy transfer (Yin, 2014). The strategy for this research diverges from traditional comparative case study methods. Instead, the study deploys a process-tracing case study method, which operates as the operationalizing mechanism for historical institutionalism in this research. Notably, the intent isn't to establish causality but to explore the drivers of policy change in the case study (Mahoney, 2000, 2004; Bennett & Checkel, 2015;

Beach & Pedersen, 2016; Zaks, 2020). Process tracing allows for a detailed analysis, enabling the identification of key actors, institutions, and events that played pivotal roles in the process that led to policy change. It also helps pinpoint the array of factors that guided the direction and scale of this change. As such, this method fits well within the study's aim to unravel the intricacies of policy transfer, fortified by the Cultural Political Economy framework.

6.3.1 Deductive-inductive approach

It is acknowledged that critical realism inherently necessitates a methodological approach that can navigate its complex ontological layers—spanning the empirical, actual, and real—and its epistemological acknowledgement of the mediated, fallible nature of our understanding. The deductive-inductive approach, paired with the process-tracing case study method, aligns with these requirements, providing a comprehensive framework to explore and elucidate the nuanced dynamics of policy change.

The deductive-inductive approach addresses this need by allowing for the application of theories to specific observations (deductive reasoning) and the generation of new theories from observed data (inductive reasoning). This approach involves a continuous interplay between inductive and deductive reasoning. With induction, the researcher moves from specific observations to broader hypotheses or theoretical insights. Conversely, deduction involves testing these hypotheses by examining their logical implications and comparing them to new observations (Mouly, 1978). Namely, as indicated in the conceptual framework, applying the main concepts identified in the previous chapter to explain the outcome is deductive, while if these theories come short of explaining and addressing the research questions, the new hypothesis is derived from the empirical findings of this study (Cohen et al., 2018; Vincent & O'Mahoney, 2018). This aligns with critical realism's emphasis on discovering unforeseen mechanisms and contextual factors specific to Azerbaijan's VET reforms, acknowledging critical realism's assertion that our understanding of reality is inevitably partial and mediated by subjective interpretation (Archer, 2016; Fletcher, 2017).

6.3.2 Operationalizing and altering process tracing

Originally, process tracing enables the detailed examination of causal processes and sequences of events, facilitating the identification of the mechanisms (real) that lead to observable outcomes (empirical) (Beach, 2016; Beach & Pedersen,

2016; Beach & Pedersen, 2019). This method's focus on causality and its ability to link specific events to broader structural conditions make it particularly suited to critical realism, which seeks to understand not just what happens but why and how it happens at a deeper, often unobservable level.

Nevertheless, many scholars used the term process-tracing to refer to forms of descriptive narratives that trace empirical events between the occurrence of a cause and an outcome (Roberts, 1996; Suganami, 1996; Abell, 2004; Evangelista, 2014; Beach & Pedersen, 2016). However, as Beach indicates, while demonstrating historical continuities, this descriptive inference lacks the ability to reveal causal mechanisms, hindering strong causal conclusions (2016). Other scholars contend that what is being traced is intervening variables between causes and outcomes (King, 1980; King et al., 1994; Gerring, 2007). Yet this understanding implies that there is some form of meaningful variation that can produce difference-making evidence that, when coupled with the ability to control for other causes, enables one to make causal inferences (Zaks, 2020). However, many philosophers of science also argue that establishing causality requires either in-depth, mechanistic evidence within a case or experimental manipulation that demonstrates difference-making (Russo & Williamson, 2007). Given this perspective, designing process tracing purely within a traditional causal framework might limit its ability to support strong causal inferences, as it primarily utilises observational data without direct manipulation (Zaks, 2020).

Nevertheless, it is acknowledged that researchers often face challenges when identifying and understanding causation. This is due to the potential for indirect, complex, and unpredictable relationships between causes and effects. Thus, effects may arise from multiple causes, manifest in non-linear patterns, or fluctuate in intensity over time. As indicated by Cohen, "causation is often an inductive and empirical matter rather than a logical, deductive matter, and, indeed, it is often unclear what constitutes a cause and what constitutes an effect as these are often umbrella terms, under which are sub causes and sub effects, causal processes, causal chains, causal webs and causal links bringing several factors together both at a particular point in time (the moment of falling, in the example above) and in a temporal sequence" (2018, p. 89). So, causation in this field is rarely absolute or directly observable; instead, it is often based on inferences, probabilities, and complex relationships between multiple variables. This stands in contrast to the deterministic cause-and-effect models found in some

scientific fields, making it difficult for educational researchers to establish definitive causal links.

Furthermore, in a complex and interconnected world, simplistic models of linear causation often fail to provide a satisfactory explanation. Instead, understanding causation may require examining networks of multiple causes, the specific conditions that enable certain outcomes, and the dynamic interactions between various factors. This approach recognises that events are rarely the result of a single, isolated cause (Morrison, 2012).

So, it is acknowledged that process tracing, as a methodological choice in qualitative research, is subject to ongoing debates about its nature and application. These debates largely revolve around whether process tracing should focus on establishing explicit causal chains or whether it is sufficient to use it to trace events to their roots, identifying influencing factors or drivers (Zaks, 2020). In this research, strictly for methodological reasons, the latter perspective of process tracing was adopted. This approach is aligned with the study's objective to unravel the complex historical and contemporary factors influencing Azerbaijan's VET system. Unlike methods that emphasise direct causality, this form of process tracing allows for a comprehensive exploration of the multitude of factors - political, economic, cultural, and institutional - that have shaped the VET system's evolution and affected policy change. This approach is particularly pertinent in educational policy research, where causal relationships are often multi-dimensional and not easily distilled into linear chains (Zaks, 2020). Rather than seeking definitive causation, this method aims to uncover the "best explanation" for a given case by interweaving theoretical insights with empirical observations (Day & Kincaid, 1994; Timmermans & Tavory, 2012).

This approach is in line with the critical realist philosophy underpinning this study, where understanding the complexity of real-world phenomena is prioritised over establishing linear causality. Distinguished from comparative methods, which might focus on outcomes in different settings, process tracing dives into the "how" and "why" within a single case scenario. The aim here isn't to weigh causality in a binary fashion but to unravel the complexity of multiple contributing factors in the context of historical institutionalism. This method allows for a nuanced view, capturing the interplay between key actors, governance structures, and situational conditions and revealing the multi-layered reality of policy change. This fits particularly well within the existing Cultural Political Economy framework

adopted in this research, enabling a deeper exploration of the drivers behind the VET policy changes in Azerbaijan.

6.3.3 Scope of the case study

This research delves into the policy change process in Azerbaijan, specifically focusing on the adoption of the Law on Vocational Education and Training. The study centres on the policy adoption phase, culminating in 2018 with the law's enactment, while subsequent implementation stages are beyond this research's scope and suggest avenues for future investigation. By employing historical institutionalism and a process-tracing case study approach, this study aims to trace back and identify the factors and drivers shaping this policy change. Without a predetermined starting point, the research followed the evidence—through collected data—until reaching data saturation, where the most influential factors were unveiled. This approach allows for a thorough exploration of the policy's developmental trajectory, providing insights into the complex process that led to its adoption.

By focusing intently on the adoption phase, the study offers insights into the heart of the decision-making process – where policies are debated, modified, accepted, or declined. This phase is a crucible of sorts, where theoretical policies face the heat of practical realities, and decisions made here set the course for future actions. Given the significance of this phase, it makes for a rich area of inquiry and also points towards the potential for future research to pivot to subsequent phases, tracing the life cycle of these policies (Robson, 2002).

6.4. Operationalizing the CPE Approach for Exploratory Analysis

In addressing the complex dynamics of policy adoption within Azerbaijan's VET system, this study seeks to methodically operationalise the Cultural Political Economy (CPE) framework through the functioning lens of process tracing. The CPE framework, enriched by prior research (Sung et al., 2000; Maurer, 2012; Verger, 2016; Valiente, Sepúlveda, et al., 2020), offers a multifaceted understanding of the policy change process. Central to this effort is the exploration of the European Union's influence, viewed through the CPE's analytical phases of **variation**, **selection**, and **retention**. This analytical approach allows for a nuanced understanding of the EU's power dynamics, its impact on national policy decisions, and an explanation of the decision to adopt EU-influenced policies.

In the CPE framework, Jessop conceptualises the phases of variation, selection, and retention as essential evolutionary mechanisms for understanding how ideas and policies are generated, gain dominance, and eventually become institutionalised. These phases are influenced by systems theory and evolutionary economics, offering a theoretical model to analyse the trajectory of ideas within political and economic structures. Variation represents the emergence of new ideas, policy proposals, or innovations, increasingly in response to external crises, socio-economic shifts, or pressures from international bodies. This phase expands the field of potential policy options, introducing alternative approaches that challenge the status quo (Jessop, 2010). Selection, by contrast, is the process through which these ideas compete, and certain options are prioritised based on their alignment with prevailing socio-economic conditions, political interests, and institutional viability. This phase entails the negotiation and filtering of ideas, where key stakeholders and power relations play significant roles in determining which ideas proceed to the implementation stage (Jessop, 2010). Finally, retention is the phase in which selected policies are institutionalised, becoming embedded within legal, administrative, and social frameworks. This process ensures the longevity and stability of a policy by integrating it into the operational structures of governance. Over time, retained policies may be adapted or modified, but they remain influential within the broader policy landscape (Sum & Jessop, 2013). The methodological implications of this framework are significant, as it enables researchers to trace the lifecycle of policy change, from ideation through institutionalisation, offering a comprehensive analysis of how certain policies gain traction while others are discarded.

Antonio Verger applies the phases of variation, selection, and retention to examine how global education reforms are introduced, selected, and institutionalised within national contexts, specifically highlighting the role of international organisations such as the World Bank and OECD in shaping these processes (Verger, 2016). What distinguishes Verger's operationalisation of CPE is his focus on the global networks of policy actors that drive the variation and selection phases. He examines how global actors introduce new education policies (variation), promote them through policy networks and advocacy coalitions (selection), and ensure their retention by embedding them within national education systems (retention). Verger's approach is particularly relevant for analysing policy change in post-Soviet contexts, where external actors such as the EU play a critical role in influencing national policy decisions. By adopting Verger's

CPE framework in this study, the research is able to unpack the complex factors influencing policy change in Azerbaijan's vocational education and training (VET) system. This framework allows for a detailed examination of how global pressures intersect with local contexts, providing a nuanced understanding of the policy transfer and adaptation process in post-Soviet states.

6.4.1 Alternative frameworks

While the current research employs the CPE framework, it is essential to acknowledge the existence of numerous alternative approaches to policy analysis, each possessing distinct strengths and limitations. For example, Gita Steiner-Khamsi utilises the Advocacy Coalition Framework in policy transfer research to delve into the complexities of global education policy re-contextualization (Steiner-Khamsi, 2018). She emphasises understanding the disjuncture between global policies and local adaptations, focusing on the social, political, and economic factors that drive the circulation and acceptance of global education policies in specific contexts. This approach highlights the critical role of local policy contexts, power differentials, and legitimacy issues in facilitating or hindering the adoption of global education policies, thus providing an analysis of policy transfer processes. The Advocacy Coalition Framework focuses on understanding the roles and interactions of groups sharing common policy beliefs within the policy-making process, emphasizing coalitions and belief systems. In contrast, the CPE framework integrates cultural studies and political economy to analyse how socioeconomic and cultural factors influence policy development and transfer. The former is more centred on actors and coalitions within policy subsystems, while the latter offers a broader analysis that includes economic structures, power dynamics, and cultural practices in shaping policies.

Alternatively, the Policy Transfer Framework developed by David P. Dolowitz and David Marsh focuses on understanding how and why policies are transferred between different contexts (2000). It examines the processes involved in policy transfer, including the reasons behind the adoption of policies from one setting to another, the actors involved, the types of policies transferred, and the degree of policy transfer. This framework is particularly interested in the mechanisms through which policies are transferred, such as coercion, emulation, or learning, and the outcomes of these transfers. The Policy Transfer Framework by Dolowitz and Marsh and the Cultural Political Economy (CPE) framework both examine the movement and adaptation of policies across different contexts. However, they focus on different aspects of this process. The Policy Transfer Framework

emphasises the mechanisms, actors, and outcomes involved in the transfer of policies, often considering the practicalities and motivations behind policy adoption. In contrast, CPE integrates cultural studies with political economy to understand how economic and cultural processes influence policy development and transfer, focusing more on the underlying socio-economic structures and power dynamics. While both frameworks can intersect in analysing policy movements, CPE offers a broader, more critical perspective on the socio-economic and cultural forces shaping policy.

Additionally, Bartlett offers to utilise the Comparative Case Study method in education policy transfer research by emphasizing a detailed, multi-dimensional analysis across different contexts, focusing on the vertical, horizontal, and transversal dimensions to understand the complexities of policy adaptation and implementation (Bartlett & Vavrus, 2014). This approach allows for an in-depth examination of how global education policies are reinterpreted and applied in diverse local settings, capturing the nuances of policy processes and outcomes. Compared to the CPE framework, which integrates cultural studies and political economy to explore the socio-economic and cultural determinants of policy development and transfer, Bartlett's method is more empirically focused and favours the examination of the transfer of the specific global education policy. While CPE provides a broader theoretical analysis of the forces shaping policy, the Comparative Case Study method offers a more granular, context-specific examination of policy dynamics, making it complementary to the broader analytical scope of CPE in understanding the details of education policy transfer. Table 8 reflects the nuanced differences and specific strengths of each framework in analysing education policy transfer.

Table 8 Frameworks for analysing education policy transfer

| Framework | Description | Education Policy Transfer Use | Data Required | Analysis Type |
|---------------------------------|---|--|--|---------------------------------|
| Comparative Case Study Analysis | Analyses similarities and differences across cases to understand variability and commonality in policy implementation and outcomes. | Used to understand contextual influences on policy outcomes, emphasizing multi-dimensional analysis. | Qualitative data from multiple case studies. | Comparative, thematic analysis. |

| | | | | |
|---|---|--|--|--|
| Policy Transfer Framework | Focuses on the mechanisms, actors, and outcomes involved in the transfer of policies, considering motivations behind policy adoption. | Examines mechanisms through which education policies are adopted across different contexts. | Policy documents interviews with policymakers. | Mechanism-focused analysis. |
| Advocacy Coalition Framework | Examines roles and interactions of groups sharing common policy beliefs within the policy-making process, emphasizing coalitions and belief systems. | Investigates the influence of advocacy groups and coalitions in shaping education policy. | Interviews, policy documents, and public statements. | Network and belief system analysis. |
| Institutional Analysis and Development Framework | Studies institutional arrangements and their impact on policy development, focusing on governance structures. | Analyses the institutional context within which education policies are formulated and implemented. | Institutional documents, legal frameworks, observational data. | Institutional and governance structure analysis. |
| Cultural Political Economy Framework | Integrates insights from cultural studies and political economy, examining how economic and cultural factors together shape policy development and transfer. Offers a critical perspective on power relations, interests, and ideologies and recognises the role of agency in policymaking. | Explores the socio-economic and cultural forces shaping education policy development and transfer. | Policy documents, media texts, interviews with stakeholders, and statistical data for empirical support. | Critical, multi-dimensional analysis focusing on socio-economic structures and discursive practices. |

While the Advocacy Coalition Framework, the Policy Transfer Framework, and the Comparative Case Study method offer valuable lenses for analysing policy transfer,

the Cultural Political Economy (CPE) framework distinctly aligns with the aims of this study, especially when considering the transfer of EU VET policies to Azerbaijan. The CPE framework's integration of cultural studies and political economy enables a comprehensive analysis of how policies are shaped by both material conditions and discursive practices, offering a nuanced understanding that other frameworks might not fully capture.

Firstly, unlike the focused analyses on policy actors, coalitions, or specific case comparisons, the CPE approach delves into how policies are influenced by underlying power relations, interests, ideologies, and hegemonic practices. This critical perspective is essential for examining the EU's influence on Azerbaijan's VET policy, as it allows for an exploration of power dynamics that shape policy acceptance and adaptation.

Secondly, the CPE framework emphasises the role of agency and ideas in policymaking, recognizing that local actors are not just passive recipients of global influences but actively engage with, adapt, and sometimes resist external policy ideas. This aspect is particularly relevant to understanding the dynamics at play in the retention phase of the adoption of the Law on Vocational Education and Training, where local conditions and actor initiatives play a crucial role.

Thirdly, the flexibility and adaptability of the CPE approach make it particularly suitable for analysing policy processes across different contexts and scales. This adaptability is vital for examining the complex interplay between global trends and local realities in Azerbaijan's VET reforms, where factors at multiple levels influence policy outcomes.

By integrating insights from cultural studies and political economy and adopting a critical stance towards power dynamics and actor agency, the CPE framework offers a more holistic and nuanced analysis of education policy transfer than the alternatives. This comprehensive approach allows for a deeper exploration of the socio-economic and cultural determinants of policy development and transfer, making it the most suitable framework for this study.

6.4.2 Exploring and Explaining

The research inherently adopts an **exploratory approach** in the initial phase, aiming to identify and map out the influence of the EU within the policy formulation process. It then transitions into an **explanatory phase**, seeking to

understand the underlying reasons and mechanisms that guided the decision-making process. This dual nature of the study—exploratory followed by explanatory—enables a deep dive into both the extent of the EU's influence and the details of the policy adoption process within Azerbaijan's VET system. In this study, the explanatory inquiry was operationalised by tracing the process backwards from the adoption of the law. This retrospective analysis scrutinised the cultural, political, and economic factors that contributed to the decision-making process, with a particular emphasis on clarifying why and how specific decisions were made. By discovering these dimensions, the study aims to provide a comprehensive explanation of the decision-making process, highlighting the interplay of internal and external factors that influenced the adoption of the Law.

This methodological framework, leveraging the CPE approach through process tracing, offers a pathway to dissect the multifaceted influence of both internal and external, as well as ideational and material factors on the policy change and allows uncovering how economic policies are embedded within and influenced by cultural narratives and political power structures. This perspective supports the research goal of investigating the complex ways international organizations influence VET reforms. The focus extends beyond simple policy adoption to include shifts in the underlying ideology and values shaping Azerbaijan's education system (Sum & Jessop, 2013). This approach can provide insights into power dynamics and the contextual factors that shape policy outcomes. As a result, it contributes to a more nuanced understanding of how international actors influence national policies.

6.4.3 Building CPE framework

Drawing from Verger's method, this study identifies drivers and factors at each policy adoption phase, further categorizing them based on their nature: external or internal, material or ideational (Verger et al., 2016, p. 30). Externally, Azerbaijan's interactions with the European Union and its alignment with global educational paradigms play a critical role. These external influences might come in the form of economic incentives, international mandates, or even soft power exertions. Internally, the government's own socio-cultural narratives, the country's historical legacies, political dynamics, and economic imperatives influence policy decisions. Similarly, while some drivers are material – like economic benefits, infrastructural challenges, or geopolitical strategies – others are ideational. These could range from cultural aspirations, historical narratives,

or visions of national identity. This complex matrix of influences, both tangible and intangible, external and internal, forms the bedrock of the adapted CPE approach in this study.

The investigation initiates with the **variation phase**, where the focus is on identifying the range of influences and policy options available at the outset of the policy formulation process. This phase catalogues the diverse sources of influence, including EU policies, recommendations, and practices, to understand the spectrum of options considered by national policymakers. Through the process tracing method, the study traces the origins of these influences and how they were introduced into the government's VET policy discourse, thereby identifying the variation in policy ideas influenced by the EU.

Following this, the **selection and retention phases** delve into the mechanisms through which specific policies were chosen, emphasizing the criteria, discussions, and negotiations that led to the prioritization of certain influences over others (Jessop, 2010; Verger, 2016). This phase aims to uncover the extent of the EU's influence by examining how and why particular EU-inspired policies were selected for adoption. The selection process is analysed to discern the factors that facilitated or hindered the incorporation of EU policies into the Azerbaijani VET system, thereby uncovering the EU's impact on the policy selection process.

6.4.4 Qualitative research

It is acknowledged that the Cultural political economy approach has a strong affinity for the qualitative approach due to its focus on meaning-making, social construction, and power relations (Sum & Jessop, 2013). In the literature on policy transfer, especially when considering the works of scholars like Jessop (2010) and Robertson (2015), Verger (2016) scholars mostly utilise qualitative data in the research. The qualitative method is eminently suitable for investigating the European Union's influence on VET reform in Azerbaijan, given the intricate and layered nature of international policy influence. This methodological approach enables an interpretation of the details of policy adoption, adaptation, and resistance within Azerbaijan's unique socio-political context (Schwartz-Shea & Yanow, 2013).

Such a qualitative lens is crucial for identifying and understanding the mechanisms through which the EU's recommendations are internalised, contested, or transformed, revealing the complex interplay between external pressures and

local agencies (Beach & Pedersen, 2019). By prioritizing qualitative insights, the research acknowledges the critical realist assertion that social phenomena emerge from the interaction of underlying structures, cultural frameworks, and human agency, necessitating a methodological approach that is both flexible and inquisitive (Pawson, 2006). This qualitative focus is further justified by its ability to incorporate stakeholders' perceptions and experiences, thereby enriching the analysis with diverse perspectives on the EU's role in shaping VET reforms (Braun & Clarke, 2006). Consequently, this study adopts a methodologically demanding qualitative framework that is well-equipped to articulate the depth, breadth, and intricacies of the policy change process, providing a comprehensive, contextualised understanding that quantitative methods may not fully capture. Nevertheless, while the qualitative lens remains paramount for understanding the complex dynamics of policy internalisation and local agency interplay, numerical data is also used to provide an essential empirical backdrop, enhancing the overall rigour and credibility of the research findings (Pawson, 2006).

6.5. Data Collection

This research delves into the VET sector reforms in Azerbaijan, particularly focusing on the policy change process that led to the adoption of the Law on Vocational Education. It utilises a dual approach for data collection, combining document and semi-structured interviews to comprehensively understand the factors and dynamics behind the adoption of EU-supported VET practices within the Azerbaijani context. The study systematically stages data collection, starting with document identification and analysis followed by interviews, ensuring thorough preparatory review and analysis before each phase. This section outlines the rationale behind choosing these specific data collection tools, highlighting their relevance and potential limitations.

6.5.1 Documents and Reports

This research primarily utilised publicly accessible online documents. Additionally, a limited number of internal documents were obtained through interviews with participants. The main types of public documents used in this study are official reports or presentations, government reports, transcripts of hearings of the Law in the parliament and press articles. The following paragraphs discuss the reasons for selecting documents as sources of data and their possible advantages and limitations for this research.

To understand the complex policy shifts within Azerbaijan's VET system, this research relies extensively on the examination of official documents. These materials serve as historical artefacts, providing records of evolving policy proposals, surrounding debates, and shifts in the way VET reforms were framed over time (Stone, 2012). Crucially, this study places a strong emphasis on the Law on Vocational Education itself. This foundational document embodies the culminating point of the policy change process. Scrutinizing this law and tracing it to other associated documents offers particular insights into the specific mechanisms and priorities enacted through the VET reforms. Hence, document analysis adopted in this study is crucial for several reasons. Firstly, it allows researchers to delve into the official discourse on VET reform, revealing the ideologies and priorities that propelled change (Ball, 1998). A close examination of language and argumentation reveals not just the mechanics of policy change but also the justifications used by policymakers to legitimise those changes or reject them (Howlett & Cashore, 2009). Secondly, document analysis sheds light on the trajectory of policy development. Comparing documents from various stages- initial proposals, legislative debates, and the final law enables researchers to map how ideas were modified, contested, or incorporated (Steiner-Khamsi, 2018). This reveals the dynamic, non-linear path that leads to the final policy product. Thirdly, document analysis can illuminate actors and power dynamics within the reform process. Authorship, citations, and notable omissions in official documents can provide clues about the individuals and institutions wielding influence, as well as the way they sought to shape the debate (Fairclough, 2003).

Hence, this study examined a range of documents, including government reports, that offer insights into the state-sanctioned critique of the existing VET system and the rationale for reforms (Pal, 2009). Parliamentary transcripts were analysed to uncover the public face of the debate, with differing political viewpoints impacting the policy's final form (Howlett & Cashore, 2009). A critical examination of EU documents was essential to assess their priorities for VET, which likely influenced, aligned with, or potentially clashed with Azerbaijan's own approach (Dolowitz & Marsh, 2000; Evans, 2009). Press articles offer a window into how these VET reforms were communicated to the public, potentially influencing their reception and future implementation (Stone, 2012).

Nevertheless, while document analysis is valuable, it is crucial to acknowledge its limitations. Official documents can sometimes reflect a certain bias crafted to

promote a particular viewpoint (Bowen, 2009). Triangulating through comparison with documents from diverse sources is a vital safeguard. Additionally, documents may not fully reflect the informal negotiations and background discussions that also shape policy outcomes (Steiner-Khamsi, 2018). Therefore, supplementing document analysis with methods like interviews is necessary to gain a truly comprehensive and nuanced understanding of VET policy change in Azerbaijan. Hence, documents are a relevant source of evidence for this research. They illuminate both the material factors (events, dates, key actors) and the ideational factors, specifically the discursive orientations, that shape the phenomenon under study. Document analysis is carefully triangulated with interview data for greater depth and validity. Since the researcher cannot control document quality, a rigorous selection process informed by established criteria ensures the analytical integrity of the chosen documents (Bryman, 2004).

Document selection played a vital role in gathering secondary data for this study. The choice to focus on reports, legislative acts, parliamentary hearing transcripts, and press materials offers insights into various facets of the policy process. These materials provide textual data, offering historical context, official records, and public discourse surrounding policy reform. The study emphasised the inclusion of official documents to ensure reliability. For press articles, publication in recognised national media outlets was a key screening criterion. Rigour was further enhanced in the case of reports by verifying the authors' backgrounds, reviewing any associated websites, and using interviews to cross-reference information.

This study adopts Flick's (2018) approach to document selection and sampling, emphasizing four interconnected criteria: authenticity, credibility, representativeness, and meaning. Prioritizing genuine sources was paramount, with a focus on primary documents directly produced by government bodies, relevant interest groups, and international organizations. These official materials were critically examined to assess authorship, potential biases, and consistency, establishing their trustworthiness as policy artefacts (Morgan, 2022).

To capture the complexities of the VET policy reform, a balanced representation of viewpoints was sought. Documents were included from various stakeholders, including government ministries, non-governmental organizations, and international bodies. This aimed to expose different perspectives on the problems,

priorities, and solutions influencing the policy development process (Steiner-Khamsi, 2004). The study focused on documents with direct significance and relevance to its core research questions. Analysis extended beyond a literal reading to consider the contextual circumstances and power relations that shaped the discourse within the documents (Morgan, 2022).

This study employs a **purposive sampling approach** for document selection, prioritizing the inclusion of relevant and high-quality sources for the analysis of VET policy reform in Azerbaijan. To ensure the authenticity and credibility of materials, preference is given to primary documents directly produced by government bodies, relevant interest groups, and international organizations (Flick, 2018). These official documents are critically scrutinised for authorship, potential biases, and consistency to verify their trustworthiness (Kridel, 2015). This approach aims to illuminate different viewpoints on challenges, priorities, and solutions influencing the policy development process (Payne & Payne, 2004). Careful attention is paid to the specific relevance and significance of each document to the study's focus. This involves interpreting the text in relation to its context and the power relations that shaped its creation (Morgan, 2022).

The purposive sampling approach directly aligns with the research questions, ensuring the creation of a focused corpus. The document collection process remains iterative, with openness to modifying the sample as the analysis progresses. The inclusion of additional documents guided by the need to support emerging insights, explore potential contradictions, or further clarify aspects of the VET reform process. To ensure sufficient data for robust analysis, the collection continued until a sense of saturation was detected, signalling that new documents were unlikely to yield significant new insights (Merriam & Tisdell, 2015). Overall, initially, 32 documents and reports and 10 press articles meeting predetermined criteria were collected. These materials offered insights into pivotal events, dates, outcomes, and actors involved in the VET policy reform. After a comprehensive review, a subset of 17 documents was chosen for in-depth analysis.

Though some reports provided detailed quantitative data, analysis primarily centred on the ideas and discursive positions of authors and their influence on policy shifts. This approach extended to reports focused on economic and labour market trends, as well as those concerning VET system budgeting. Similarly, a

small, curated selection of press articles was included for analysis. These contained public statements from key figures who declined or were unreachable for direct interviews. While recognizing the limitations of secondary sources, careful review and cross-checking with existing interview data revealed the role of press releases in shaping the policy adoption narrative. This information was deemed crucial for a complete analysis. Table 9 lists the documents used for analysis.

Table 9 Overview of the documents used in the study

| # | Year | Document | Main actors |
|----|------|--|---|
| 1 | 2003 | Decree of the President of the Republic of Azerbaijan on approval of the "State Program on Poverty Reduction and Economic Development in the Republic of Azerbaijan for 2003-2005" | The President, World Bank, Ministry of Economy |
| 2 | 2005 | Employment Strategy of the Republic of Azerbaijan (2006-2015) | The President, the Ministry of Labour |
| 3 | 2006 | EU Azerbaijan action plan | European Union, Republic of Azerbaijan |
| 4 | 2006 | Turning Black Gold into Human Gold Using Oil Revenues to Attain Sustainable Development Report | MHC International, Ministry of Economy |
| 5 | 2007 | State Program for the Development of Technical Vocational Education (2007-2012) | The President, Ministry of Education |
| 6 | 2009 | Law on Education | The parliament, Ministry of Education |
| 7 | 2010 | Torino Process 1st report | European Training Foundation, Ministry of Education |
| 8 | 2010 | State standard and program (curriculum) of the Initial Vocational Education | Cabinet of Ministers, Ministry of Education |
| 9 | 2012 | Azerbaijan 2020: Vision for the future Development Concept | The President, PricewaterhouseCoopers |
| 10 | 2013 | State Strategy for the development of education in the Republic of Azerbaijan | The President |
| 11 | 2014 | EU Education Support programme | European Union, Ministry of Education |
| 12 | 2016 | Strategic Road Map of the development of the national | The president, McKinsey & Company |

| | | | |
|----|------|--|--|
| | | economy of the Republic of Azerbaijan | |
| 13 | 2016 | Strategic Roadmap for Vocational Education and Training | The president, McKinsey & Company, Ministry of Education, State Agency for VET |
| 14 | 2016 | EU Support to VET in Azerbaijan project terms of references | The European Union, State Agency for VET |
| 15 | 2018 | Transcript of hearing of the Law on Vocational education | The parliament |
| 16 | 2018 | Law on Vocational Education | The parliament, State Agency for VET |
| 17 | 2018 | National Qualifications Framework for Lifelong Education of the Republic of Azerbaijan | Cabinet of Ministers, Ministry of Education |

This list of documents reveals a multi-faceted narrative of VET policy evolution in Azerbaijan over the past two decades. Government pronouncements like the "Strategy for Poverty Reduction and Economic Development" unveil national priorities linking education to broader economic goals and potentially acting as reform triggers that set the national agenda. In contrast, documents from the European Union and the World Bank offer external assessments that introduce international best practices and highlight areas for improvement based on global benchmarks. Furthermore, specific policy initiatives like the "State Program for the Development of Technical Vocational Education" and the "Law on Education" delve into the practical implementation of past reforms, providing details about the changes enacted, their intended outcomes, the tools and mechanisms selected and retained during the process, and the educational framework that would accommodate any new changes.

6.5.2 Semi-Structured Interviews

Interviews were selected as the cornerstone of data collection in this study due to their adaptability in addressing research objectives (Cohen et al., 2018). This method offers researchers control over the dialogue, ensuring that gathered information closely aligns with study goals (Bryman, 2004; Hesse-Biber, 2017).

While interview types vary, they are typically classified as structured, semi-structured, or unstructured (Merriam & Tisdell, 2015; Hesse-Biber, 2017). This study employed semi-structured interviews for their flexibility and ability to uncover deeper meaning. This format provides researchers with a list of key

themes or questions, adaptable to the natural flow of the conversation (Galletta & Cross, 2013). This flexibility is necessary for exploring emerging issues and aligning with the process tracing-case study design (Beach & Pedersen, 2019). Interviews offer rich descriptions that reveal participants' perspectives (Hesse-Biber, 2017), helping to identify causes and relationships in complex processes (Robertson & Dale, 2015). Furthermore, since this study examines past events and unobservable processes, interviews have become an indispensable tool for this case study (Merriam & Tisdell, 2015).

However, it's important to acknowledge the potential for "interviewee bias" when utilizing this method (Galletta & Cross, 2013). This occurs when interviewees withhold or selectively share information, impacting the completeness of the data gathered (Hesse-Biber, 2017). Particular vigilance is required in this study, as some interviewees hold positions of power or influence, such as policymakers and senior executives (Cohen et al., 2018).

Interviews with high-level participants are considered elite interviews, presenting potential challenges with interviewee bias (Hesse-Biber, 2017). This study employed rigorous preparation to minimise bias during interviews, which involved conducting interviews after exhaustive document analysis to understand the policy change and researching each interviewee's professional background, organization, and policy involvements.

Interview guides were carefully designed with the study's research questions in mind. They featured open-ended questions organised into sections based on themes. These themes came directly from the initial document analysis. This process helped make sure the interview addressed any unclear points or gaps in understanding found in the documents. Additionally, each guide included an introductory section focused on the participant's organization, role, and the skill-related challenges they face. This approach provided helpful context about the interviewee's position within the policy being studied and helped start the conversation naturally. Before the interviews, below are semi-structured interview questions prepared to guide the conversation (see Appendix 5).

The chosen interview questions and their thematic organization in this study are justified by the application of the Cultural Political Economy (CPE) framework. The CPE framework emphasises the importance of actor analysis, which necessitates a comprehensive understanding of the roles and power dynamics

among various stakeholders involved in the reform process. The interview questions are designed to identify these stakeholders, encompassing the government, international organisations, educational institutions, and potentially other relevant actors. Furthermore, the questions facilitate the identification and analysis of discursive struggles, acknowledging the competing ideas and rationales presented by different stakeholders throughout the reform.

Overall, the chosen thematic blocks and research questions offer an opportunity to delve into the historical context and identify the economic, social, or political challenges that necessitated the VET reform. These challenges are likely to reflect the dominant discourses and power structures that shaped the policy landscape at the time, thus justifying the focus on uncovering these historical triggers.

Similarly, the other thematic blocks and research questions enable the examination of the policy solutions advocated by various actors involved. These questions delve into the underlying rationales and ideologies driving these solutions, potentially reflecting economic imaginaries (e.g., focus on labour market skills) or competing visions for VET as a result of the policy change. Additionally, the formulated interview questions aim to unpack both the resistance encountered by proposed solutions and the ultimate shaping of the policy as a result of the reform process. Interview questions were also designed to understand how the proposed solutions were received and the final form the policy took after navigating potential opposition and adaptations.

In general, interview guides were constructed to prompt interviewees to reflect on key themes (reform triggers, actors, proposed solutions, opposition, and retention). The insights gained from these interviews were directly tied to the participants' capacity to remember and thoughtfully analyse the events, reasons, and circumstances behind the policy's adoption. The final interview guides used for this study can be seen in the Appendices.

Accordingly, interviews for this study followed a purposive sampling strategy (Cohen et al., 2018). This type of strategy is used when the researcher samples based on obtaining interviews with people relevant to the study's research questions and objectives (Daniel, 2012). In this sense, Study participants were chosen based on their active involvement in the bodies reforming and shaping Azerbaijan's VET system. This direct experience and professional role make their

perspectives particularly relevant to understanding the dynamics of policy change within this sector. The overall description of the selected interviewees is indicated in Appendix 5.

In the development of this research project, a broad-based strategy was adopted for the selection of interviewees to ensure a wide range of perspectives aimed at providing a deep and diverse understanding of the policy process. The selection was informed by specific criteria, targeting insights from various angles:

1. Direct Involvement in Decision-Making

Focus was placed on individuals directly involved in the decision-making processes at different stages of policy adoption, including variation, selection, or retention phases. This group consisted of policymakers, government officials, and organizational leaders whose roles were central to shaping the policy, providing key insights into the decision-making landscape.

2. Consultation During Policy Formation

Engagement with people who contributed to the policy's formation was also key, including experts, advisors, stakeholders, and community representatives. This diversity of voices added to the understanding of the collaborative and consultative efforts that informed the policy's development.

3. Directly Affected Individuals

To grasp the real-world effects of the policy, the study included individuals, businesses, and communities directly impacted by its implementation. Their experiences provided insight into whether the policy adoption process was inclusive of all stakeholders.

4. Participants in Document Preparation

The research incorporated individuals involved in preparing the foundational documents, reports, and supporting materials critical to the policy's formulation. This group brought detailed insights into the research, analysis, and arguments that underpinned the policy framework.

5. Opponents of Specific Policy Aspects

The inclusion of individuals and groups who opposed certain parts of the policy was essential for a comprehensive view. Their perspectives were invaluable in understanding the policy's contentious aspects, including the debates and resistance it faced.

Therefore, the selection criteria for research participants were thoughtfully devised to ensure an exhaustive exploration of Azerbaijan's VET sector reforms. Alongside individuals directly involved in the decision-making, those consulted during policy formation, affected parties, document preparers, and policy opponents, the study also sought perspectives from individuals knowledgeable about the historical evolution of the VET system in Azerbaijan. These participants, while not directly involved in the recent policy changes, provided valuable historical context and insights into the long-term development trends and challenges within the VET landscape. This inclusive approach aimed to construct a nuanced narrative of the reform process, capturing the depth and diversity of experiences and viewpoints surrounding the VET policy implementation.

The timeline for data collection spanned six months, from June 2022 to December 2022. Initially, the target was 30 interviewees. However, by the culmination, valuable insights were extracted from 24 interviews encompassing high-ranking officials, experts, and stakeholders integral to the VET reforms. The data collection was primarily obtained through face-to-face conversation, occasionally online, using Zoom software. These interviews ran from approximately 30-90 minutes. Interview lengths varied, with some exceeding the planned one-hour timeframe and others being shorter due to participants' busy schedules. Additionally, participants provided access to a few valuable internal documents relevant to EU-funded projects.

Determining the point at which no further interviews are necessary is crucial in qualitative research. This study employed thematic saturation to achieve this, aligning with the principles outlined by Guest, Bunce, and Johnson (2006). As interviews progressed, recurring themes and perspectives emerged consistently. Notably, no significant new themes or viewpoints arose in the later interviews, indicating that the core aspects of the VET reform process had been adequately captured. This thematic saturation provided a strong indication that additional interviews were unlikely to yield substantially different insights, justifying the conclusion of data collection at 24 interviews.

6.5.3 Ethical Considerations

The research was executed with the utmost adherence to ethical standards, sanctioned by the Social Sciences College Research Ethics Committee for Non-Clinical Research involving Human Participants at the University of Glasgow.

Ethical considerations are crucial in elite interviews because issues of anonymity and confidentiality are tied to the power dynamics between the researcher and the participant (Lancaster, 2017, p. 98). Addressing power imbalances and establishing clear ethical boundaries throughout the interview process is essential. This means transparently explaining the research goals, obtaining genuine informed consent, and continuously respecting the participant's right to withdraw or adjust their level of participation (Hesse-Biber, 2017). Hence, the procedure was taken regarding the Participant Information Sheet and Consent forms during the interview. However, consent was received verbally, according to the preference and convenience of each participant.

Acknowledging pre-existing relationships with certain government actors involved in the VET reform process, measures were undertaken to ensure that no interviewee felt pressured to participate solely due to these connections. Communication primarily relied on official university email, minimizing the use of personal channels. In rare instances, follow-up calls were made solely to confirm interview dates. All necessary research documentation and information were provided via email beforehand, further emphasizing transparency and formal communication channels. These measures aimed to mitigate any potential coercion and ensure that participants felt comfortable and informed throughout the research process.

Data security in online interviews and audio recordings posed a primary concern. To address this, university-provided platforms like Zoom and Microsoft Teams were utilised to enhance their digital security. Data management protocols aligned with the University's privacy policy were strictly followed to protect the audio recordings. The study approached participants with transparency, outlining the research objectives and their roles. Before each interview, oral consent was obtained, ensuring participants understood their rights, privacy protections, and the use of audio recordings. The process also guaranteed participants the right to withdraw, with their data excluded and an alternate participant approached if necessary.

The analysis of documents, reports, and press articles accessed from the internet raises potential ethical concerns, even though the data exists within the public domain. While traditional informed consent may not always be practical, researchers must remain sensitive to potential issues regarding the intended use

of these materials, especially if their original context suggests a limited intended audience (Eysenbach & Till, 2001). This study prioritises the protection of individuals and potentially vulnerable groups. A strict anonymization protocol was implemented, and the analysis carefully considered the source and context of the materials to minimise the risk of misrepresentation or harm.

Maintaining robust anonymity is especially critical when conducting research with elite participants, as their positions of power and access to sensitive information can make them vulnerable if their identities are revealed (Mikecz, 2012). This study addressed this concern by ensuring the clear anonymity of each participant in advance. Confidentiality was assured both orally and within an Information Sheet. This guarantee incorporated the use of and outlined specific details that might be obscured, such as names, job titles, or organizations, based on the participant's preference. All data was stored securely in accordance with the University of Glasgow Data Protection procedures, ensuring that participant confidentiality was prioritised while maintaining research integrity. All the recordings and transcriptions are stored directly in the Microsoft OneDrive that was provided by the University. The principle of autonomy was honoured by providing participants with comprehensive information about the research's risks and benefits. This enabled informed decisions regarding participation. The study design emphasised the benefits of research for participants while minimizing potential harms and striving for an equitable distribution of benefits and burdens.

Nevertheless, data collection, though careful and structured, encountered several hurdles. Access to specific documents regarding the EU projects, especially those detailing budgeting and expenditure, was often difficult. These documents, frequently classified as confidential or internal, required extensive negotiations and commitments to uphold confidentiality before access was granted. Additionally, scheduling interviews with certain elite participants posed a logistical challenge due to their demanding roles and limited availability. Furthermore, some potential participants expressed reservations about the research questions and how their views might be disseminated. These necessitated careful explanations of the study's academic purpose and robust anonymity protocols to address their concerns.

6.6. Data Analysis

As indicated earlier, the analysis of documents was conducted in two stages. Initially, documents were analysed to unearth initial themes and to pinpoint gaps in relation to answering the research questions. From this first stage of document analysis, interview questions were derived, which then steered the subsequent data collection phase. Before proceeding with the data analysis, all interviews were transcribed, a process that was crucial for revisiting and reflecting on non-verbal cues encountered during the interviews. Some documents, as well as the interview transcripts, were in Azerbaijani language. It was decided that full translations of these transcripts would not be undertaken; instead, translations would be limited to quotations directly utilised in the study's findings. For the final phase of data analysis, both the interview transcripts and the previously analysed documents were revisited, facilitating a more comprehensive approach to deriving findings from a rich tapestry of qualitative data. In total, the analysis included 17 policy documents and 24 interview transcripts, offering a substantive basis for the study's findings.



Figure 6 Six-step Approach to Thematic Analysis (Braun & Clarke, 2021)

The examination of documents and interview materials was conducted through Reflexive Thematic Analysis (RTA), applying the comprehensive six-step methodology (see Figure 6) outlined by Braun and Clarke (Braun & Clarke, 2006; Braun, 2021; Braun & Clarke, 2021). RTA was selected for its flexibility in open-endedly engaging with the data, allowing for the emergence of themes grounded in both the tangible evidence and the subjective experiences of participants (Hesse-Biber, 2017). Braun and Clarke characterised RTA as a methodologically adaptable approach, ideal for "identifying, analysing, and interpreting patterns of meaning (themes) across a qualitative data set" (2021, p. 4), thereby facilitating a nuanced understanding of the data. The investigation employed an abductive analytical strategy, in alignment with critical realism, beginning with themes and concepts from the theoretical and conceptual frameworks utilised in the study, specifically incorporating the Cultural Political Economy framework. This approach underscored the interplay between material and ideational factors,

alongside the consideration of both local and global influences. The approach used an open-ended, iterative framework for determining what meanings and influences were involved in the reform process, as well as how these events and actions shaped the final policy (Maxwell, 2013).

Reflexivity involved drawing upon the researcher's experiences, pre-existing knowledge, and social position, critically interrogating how these aspects influenced and contributed to the research process and potential insights into qualitative data. This approach was particularly crucial for the study, given the researcher's direct involvement in the policy change process within the VET system of Azerbaijan between 2015 and 2020. Being an integral part of the team responsible for carrying out the reform and participating in all three phases of policy change—from variation to selection and to retention—endowed the research with a unique perspective on the reform process. Reflexive Thematic Analysis, as advocated by Braun and Clarke, was instrumental in enabling the acknowledgement and integration of these insights within the research. This methodological choice was underpinned by the authors' characterization of RTA as adaptable and suitable for "identifying, analysing, and interpreting patterns of meaning (themes) across a qualitative data set" (Braun & Clarke, 2006, p. 4), thereby facilitating a nuanced understanding of the data.

Braun and Clarke's emphasis on 'analytic sensibility'—the skill of "reading and interpreting data to produce insights into the dataset that goes beyond the obvious or surface-level content, and to noticing connections between the dataset and existing research, theory, and the wider context" (2006, p. 45)—underscored the importance of situating this analytic skill within a systematic research framework. Thus, the six-stage model enabled a structured approach for undertaking data analysis both from empirical data and from the researcher's professional and personal experience. Utilizing RTA thus ensured that the analysis was not only grounded in empirical evidence but also enriched by the researcher's firsthand experiences, enhancing the depth and relevance of the study's findings. This methodological approach underscored the significance of reflexivity in research, treating knowledge as situational and a consequence of the interaction between the researcher and the data, thereby acknowledging the inherent interplay between the researcher's role in the process and the insights derived from the study.

6.6.1 Six-stage Thematic Analysis

The six-staged approach illustrated in Figure 6 allows the application of the above-mentioned technique for data engagement, coding and theme development. Thus, in the *Familiarization stage* of data analysis, a comprehensive review of each document and interview transcript was undertaken, along with a re-listening of the audio recordings of the interviews. This initial phase was approached with the aim of understanding the inherent goals of the documents and grasping the motivations of the interviewees from their perspective, without the influence of specific research questions or objectives. Notes were taken during this engagement with the data, ensuring a thorough exploration, with each document and interview treated as a distinct entity. The simultaneous process of listening and reading was crucial to verifying the accuracy of the transcripts, reinforcing the study's credibility and robustness. Given the significant role of transcriptions as "powerful acts of representation [that] can affect how data are conceptualised" (Oliver et al., 2005, p. 1273), this aspect was carefully considered. After this initial phase, the analysis proceeded to a more targeted examination, now informed by the study's research aims, objectives, and questions, evolving from simple familiarization to a phase of critical and reflexive engagement with the data. This systematic approach, guided by the insightful questions regarding the understating of the data proposed by Braun and Clarke (2021, p. 44), proved crucial in identifying initial potential explanatory factors within the various stages of policy change.

The *Coding stage* entails a systematic examination of the data, identifying segments that are notably interesting, relevant, or provocative in relation to the research question, followed by the annotation of these segments with succinct descriptions or codes. Braun describes coding as an evolving, exploratory tool. It involves the researcher's knowledge, perspectives, and close, systematic analysis of the dataset (2021, p. 72). The coding templates employed in this study were derived from the conceptual framework chosen to steer the research, incorporating a priori themes reflective of the Cultural political economy approach to scrutinise policy change. These a priori themes, or analytical framework themes, served as broad categories for grouping data pertinent to each theme, thus facilitating a focused analysis aligned with the research questions informed by the framework.

Furthermore, data analysis was conducted independently for each document and interview transcript using NVivo software. To systematically categorise data relevant to policy change, an initial coding template with three main themes (variation, selection, and retention) was utilised. This approach allowed for a focused analysis of each interview and selected document, ensuring the identification and organization of text segments relevant to the thematic focus. This thematic investigation functioned as a methodological lens, shaping the analytical approach by framing questions posed to the data (Corbin & Strauss, 2008). This resulted in an initial list of emerging codes directly drawn from the data. While this preliminary list was not directly incorporated, it significantly informed and guided the subsequent coding according to the template, ensuring a rigorous and focused analysis.

During the *Generating Initial Themes stage*, codes were organised into themes, reflecting the intricate patterning of meaning throughout the dataset, as described by Braun and Clarke, who define a theme as "a pattern of shared meaning organised around a central concept" (2021, p. 78). Unlike codes, which are typically confined to a single idea, themes were developed to encapsulate multiple aspects, all unified by a "central organizing concept" (Braun, 2021, p. 80). The development of themes was a deliberate and thoughtful process closely aligned with the research aims and objectives. It was recognised that a theme did not need to encompass all data elements; however, it was essential for each theme to have a clear organizing concept, distinctiveness, and the capability to stand independently.

This stage led to the formation of data clusters or categories corresponding to each theme, ranging from a single line to longer text passages. Each data unit within the theme clusters underwent a detailed review, analysis, and comparison, facilitating a further categorization into sub-themes that resonated with the cultural political economy framework. This nuanced classification illuminated the connections between data and various factors, such as material or ideational elements. Consequently, this process yielded smaller, more focused data clusters for each theme and sub-theme, enhancing the depth and specificity of the analysis.

In the *Developing and Reviewing Themes stage*, the process entailed a rigorous review and refinement of themes that had been preliminarily identified. This

critical phase involved a detailed re-examination of the entire dataset, with a focused review of coded segments, to ensure the themes accurately reflected the data. The objective was to cultivate themes that were not only deeply aligned with the research question but also robust and capable of providing a nuanced analysis. To achieve this, certain themes were eliminated due to their lack of alignment with the broader narrative or insufficient relevance to the research aims. Concurrently, adjustments were made to the remaining themes, incorporating a more profound understanding of the data acquired through the analysis's earlier phases. This step was guided by the principle that the significance of a theme was not predicated on its frequency within the data but on its ability to contribute meaningfully to addressing the research question (Braun, 2021). Through this process, the analysis was fine-tuned to ensure that it remained closely tied to the research objectives, thereby enhancing the study's depth and insight.

In the *Refining, Defining, and Naming Themes stage*, the task was to creatively and thoughtfully name the themes, drawing on Braun and Clarke's advice for names that are "informative, concise, and catchy" (2021, p. 111). Effective theme names are designed to both reveal the analytical depth of the paper and captivate the reader's interest. Thematic summaries were carefully created, combining quotes from participants and key findings from the analysed documents to provide a well-rounded understanding of each theme. This step was not only an analytical and reflective practice but also often necessitated revisits to both interview data and documents for enhanced interpretation, which is a critical phase in theme development. Through this thorough process, 15 primary themes emerged, each contributing to a comprehensive understanding of phases of policy change. Notably, while some themes aligned with Verger's (2016) framework, others were unique to this case study, highlighting new insights specific to the context of the reforms being examined. This blend of expected and novel themes underscored the study's contribution to expanding the current understanding of educational reform within specific national contexts. The following 15 primary themes were identified through data analysis:

1. **Problematization of Human Capital Issue:** Reflects the growing concerns around human capital development and how it's increasingly recognised as a cornerstone for economic growth and societal advancement.

2. **Migrant Workers:** Highlights the challenges and implications of migrating workers, both in terms of the domestic labour market and broader socio-economic dynamics.
3. **Cost Sharing Mechanism:** Addresses the economic considerations and the restructuring of financing mechanisms in the education sector.
4. **World Bank Reforms:** Examines the influence and impact of reforms introduced or recommended by the World Bank, especially in relation to VET.
5. **National Qualifications Framework:** Sheds light on the systematic efforts by the EU to create a standardised framework for skills and qualifications, facilitating alignment with the EU's education landscape.
6. **Availability of the EU Best Practice:** Points to the influence of European educational models and practices, indicating a potential move towards alignment or at least consideration of European standards.
7. **Negative perceptions of the VET system:** An acknowledgement of the lingering perceptions and potential challenges arising from historical and educational paradigms and their influence on reforms.
8. **Skills Shortage:** Recognises the existing gap in skills and the pressing need to address this through comprehensive VET reforms.
9. **Centralised Governance:** Speaks to the overarching governance structure and its implications on the execution and effectiveness of educational reforms.
10. **Role of the Ministry of Education:** A focus on the Ministry as a key stakeholder, its influence, challenges, and role in the reform process.
11. **Soviet Past and Europeanisation:** Negative perception of the Soviet legacy shapes contemporary political, economic, and policy decisions.
12. **Political champion:** Highlights the agency's influence and role as a leading institution in the reform process, which may be pivotal in the decision-making and adoption of VET reforms.

13. **Youth Demographic Change:** Addresses the changing demographics, particularly the youth segment, and the implications for educational strategy and focus.
14. **Paradigm Shift to Human Capital:** A deeper exploration of the increasing recognition of human capital as an asset, moving away from mere labour force considerations.
15. **Low Expectations from Society:** Unpacks societal perceptions and expectations regarding VET and the broader educational landscape, indicating potential challenges in societal buy-in or the need for awareness-building.

In the concluding *Writing-up stage*, the methodology was closely aligned with Braun and Clarke's recommendations, focusing on constructing an analysis that captivates and engages the reader while convincingly validating the arguments and the integrity of the themes developed. In this stage, the analysis provides a *thick description*, as suggested by the authors, which applies to this study in relation to reflexive TA analytic writing (Braun, 2021). Although the concept of thick description originated in ethnography, it is now in wider use and broadly understood as referring to the analysis provided in an analytic narrative style which is richly contextualised and interpretative (Ponterotto, 2015). This phase transcended the quest for a singular, undiscovered truth. Instead, it embraced a nuanced perspective, striving to provide a detailed, contextualised, and compelling account of the investigated issue. The activities involved thoroughly presenting the findings in a manner that underscored their significance and influence, ensuring the research's contributions were effectively integrated into the existing scholarly dialogue. This approach facilitated a narrative that not only presented the analytical outcomes but also emphasised their relevance, enriching the academic discourse on the topic.

6.6.2 Discourse Analysis

In complement to Reflexive Thematic Analysis, Discourse Analysis (DA) was integrated into the study, guided by the methodology of Rogers et al. (2016). This approach was selected for its efficacy in dissecting the intricate, multi-dimensional aspects of the VET reform, with a particular focus on the interplay between political forces, socio-cultural traditions, and economic influences across different scales. The rationale behind combining RTA with DA was influenced by

Gareth Terry's work, which highlights the symbiosis between constructing themes and the nuanced interrogation of language and discourse to uncover patterns and synthesis within a dataset (2017). This hybrid approach, termed 'critical thematic analysis,' leverages the strengths of reflexive TA and insights from critical discursive psychology or poststructuralist perspectives, facilitating a more granular examination of how language is employed to achieve specific ends.

However, it is important to acknowledge that the discourse analysis employed in this study differs slightly from more rigorous forms of Critical Discourse Analysis (CDA) that delve deeply into the linguistic structures of the discourse. This study primarily utilises discourse analysis to identify themes for data analysis, explore the justifications for proposed policy measures, and understand the processes of rejection and retention within the policy change process. This semiotic investigation, aligned with Jessop's (2010) work on cultural political economy, focuses on the broader meaning-making processes and power dynamics embedded within the discourse, rather than a granular examination of specific linguistic features.

The integration of DA was instrumental in uncovering how language and discourse serve as conduits for power, influencing and reflecting the policy reform process. By examining the patterned ways language is utilised to achieve specific ends and identifying the discourses that shape individuals' accounts, the study shed light on the positions and implications constructed by these discourses. This approach was essential for revealing the nuanced ways in which power relations are embedded and reproduced through discourse, offering insights into the mechanisms through which educational reforms are negotiated and implemented (Fairclough, 2003).

By maintaining a focus on thematic construction and reporting while simultaneously drawing out specific discursive features relevant to power relations, the study was able to present a detailed narrative that not only encapsulated the thematic essence of the reforms but also critically analysed the discourse surrounding them. This dual focus enriched the analysis, providing a comprehensive picture of the policy change process and the power dynamics at play, thereby contributing significantly to the understanding of how discourse shapes and is shaped by the policy initiatives and their enactment within the policy adoption phase.

6.7. Research Reliability and Validity

Ensuring validity and reliability in research is pivotal for establishing the credibility and trustworthiness of the study's findings. In this research, strategies aligned with Yin's (2009) recommendations for case studies are employed to address construct validity, internal validity, external validity, and reliability, ensuring a robust methodological framework.

Construct Validity: To ensure construct validity, multiple sources of evidence are utilised, fostering convergent lines of inquiry and a richer, more comprehensive understanding of the phenomena under study. This approach, as suggested by Yin (2009), allows for the triangulation of data, enhancing the validity of the findings. Furthermore, a clear chain of evidence was established to ensure transparency and traceability in the research process. To ensure accessibility, the research will be made open access. This will enable participants to review the findings and provide feedback if they choose to.

Internal Validity: Pattern-matching technique is employed to address internal validity, as advocated by Yin (2009) and Trochim (2006). This involves comparing predicted theoretical patterns within the data against observed operational patterns, thereby testing the theoretical propositions of the study and eliminating plausible alternative explanations. Such a methodical approach ensures that the causal relationships identified are credible and robust.

External Validity: While case studies often face challenges with generalizability due to their context-specific nature, strategies are implemented to enhance external validity in this study. Following Yin's (2009) guidance, careful use of theory in single-case studies facilitates analytic generalizability, allowing for the generalization of findings to broader theories. This is complemented by considering the potential for replication studies, which further underscores the relevance and applicability of the findings beyond the immediate study context.

Reliability: Reliability is ensured through the establishment of a case study database, as recommended by Yin (2009). This database serves as a repository for all data collected, allowing for comprehensive documentation and easy retrieval of information. Such thorough documentation of the research process and findings enables respondent validation and ensures that the study can be audited or replicated, enhancing the transparency and repeatability of the research. By carefully applying these strategies, this research aims to uphold the highest

standards of methodological rigour, ensuring that the findings are valid and reliable and contribute meaningfully to the existing body of knowledge on the subject.

6.8 Conclusion

In conclusion, this study adopted a critical realist research philosophy and a process-tracing approach to investigate the complex factors influencing the adoption of EU-backed policy models in Azerbaijan's VET system reform. This methodological framework was vital for exploring the multifaceted, non-linear dimensions of policy transfer, guided by the Cultural Political Economy framework's emphasis on global-local, material, and ideational influences on policy change.

The research employed a qualitative, single-case study design, utilizing semi-structured interviews and extensive document analysis. This ensured a rich dataset, with perspectives gathered from key stakeholders - including policymakers, international organization representatives, VET providers, and industry representatives - and insights extracted from diverse sources like national policy documents, international organization reports, and media materials.

A significant strength of this design was its focus on reflexive process tracing. This allowed for a nuanced understanding of the drivers of policy change while explicitly incorporating the researcher's own experiences and insights within the analytical process. The comprehensive thematic analysis provides a robust foundation for unpacking the chronological policy change process.

The subsequent findings chapter delves into the identified themes, applying the Cultural Political Economy framework to analyse the key factors impacting policy change phases - specifically the variation, selection, and retention stages. This offers valuable insights into the dynamics that shaped VET reform.

CHAPTER 7: FINDINGS

7.1 Introduction

As noted in the context chapter, political and economic factors such as poverty reduction, economic stabilization, and transition to a market economy were prioritised by the government over reforming the education sector, particularly VET, until the mid-2000s. However, the adoption of the Law on Vocational Education in 2019 signalled a change in policy, resulting in alterations to the practices and institutional arrangements governing the VET sector, as well as the articulation and justification of new policy objectives, the modification of the policy reference frame, and a shift in underlying philosophical or ideational paradigms (Sabatier, 1998; Langbein & Börzel, 2013). This research investigates the case of Azerbaijan's VET policy reform and the multifaceted role of the European Union (EU) in influencing and shaping its characteristics. It aims to understand the complex interplay of global and local forces that shaped the country's policy choices. With a focus on policy transfer and adaptation, the study provides a detailed analysis of the EU's influence on Azerbaijan's VET system. The following central research questions guide this investigation:

- To what extent has the VET reform in Azerbaijan been influenced by the European Union?
- What interplay of local and global factors, including material and ideational drivers, determined the trajectory of these reforms?
- What specific VET mechanisms were proposed for introduction in the Law on Vocational Education, which of these were ultimately integrated into or excluded from the policy, and what were the reasons for these decisions?

To answer the research questions, the findings chapter utilises Verger's (2016) cultural political economy framework for a comprehensive and nuanced analysis. Drawing from the 15 themes identified in the previous chapter, the analysis explores the factors influencing the policy change process. Each theme represents either a global-local, ideational, or material factor with economic, political, or cultural implications. Verger's stages of variation (problem definition), selection (solution choice), and retention (regulatory inclusion) structure this investigation. This chapter, as noted in the methodology section, aims to unpack and provide a "thick description" of the key drivers of policy change, paving the way for directly addressing the research questions in the subsequent chapter (Braun, 2021).

7.2 Variation - Setting the Stage: Problematization and Global/Local Dynamics

This section presents the findings of data analysis concerning the prioritisation and problematisation of VET sector reform in Azerbaijan. In line with the cultural, political and economic framework guiding this study, the findings are presented according to variation mechanisms for policy change. Variation is triggered when dominant policy discourses and practices require revisitation because of a range of considerations which would put pressure on politicians to begin significant changes in the education system (Verger et al., 2016). Accordingly, this section presents the findings that explain the primary triggers of the reform of the VET sector in Azerbaijan after more than twenty years of standstill. The analysis of data and subsequent findings indicate that negative feedback by international actors about the human capital condition in Azerbaijan, as well as skills shortage in the local labour market, triggered the reform in the VET system. The following section unpacks these factors and highlights the main events and actors who took part in these phases.

7.2.1 World Bank's Conditionality

The severe economic and social crisis in the early years of the country's independence, along with the reforms led by the World Bank and IMF to address these issues, are key factors that influenced the policy change process and should be emphasised. Thus, the IMF and World Bank-backed decision to reduce public spending directly affected the financing of education, and without the necessary funding, the VET, which was part of the education system, was spiralling down and facing the biggest hit. Consequently, underfunded and under-resourced VET was not able to play its role in the skills formation system on the eve of the structural reforms in the economy. Additionally, the lack of support for VET among large corporations and the public was a significant barrier to the government's ability to commit the large sums of money needed to invest in the system.

As in most parts of Eastern Europe, the IMF and World Bank were among the key players supporting the economic reform process. Although the IMF, at the early stages, was more concerned with short-term stabilisation measures and policies and focused on reforming countries' balance of payments, the World Bank focused on long-term development and concentrated its efforts on reconstruction issues (Belot, 1995). The World Bank noticed that as a previously socialist country, the widespread public view in Azerbaijan was that government employment should be a mechanism to provide income support for the country's population. So, "an

agenda for radical reform of public sector institutions" was developed by the Bank (World Bank, 1999), together with other measures similar to its agenda in other Post Socialist countries aimed at tackling this issue. In particular, in its reform document, it is indicated that:

Employment in education and health, which accounts for 70 per cent of government employment, is particularly high. The high level of government employment contrasts with the relatively small size of the government as measured by either expenditure or revenue as a share of GDP. There is evidence that, despite relatively low wages in the government, the share of wages in total expenditures has continued to rise at the expense of outlays critical for providing public services (International Monetary Fund, 1997, p. 29)

Thus, the importance of this reform for the education sector was significant because its financing was directly dependent on the state budget. Therefore, when the government announced that in order to maintain macroeconomic stability and to keep inflation at a low level (2-3%), state expenditures would be limited to a sustainable and non-inflationary level in the medium term (Government of Azerbaijan, 2003), it meant that these expenditures would be mainly cut from the education budget. For a country transitioning from a socialist system to a new market system, already struggling to build its economy and social welfare, cutting the education budget would have devastating short-, medium-, and long-term consequences.

Following World Bank recommendations, the government reduced its spending, impacting education budgets. This reduction was framed as part of the country's poverty reduction strategy, as outlined in its official Poverty Reduction State Program:

The share of education-related expenses in the total state expenses will decrease from 17.0% to 16.4%. Appropriate financial resources will be allocated to increase equal opportunities to acquire knowledge and improve access to textbooks and educational institutions (Government of Azerbaijan, 2003, p. 14).

Education expenditure as a share of the state budget reached its peak in 2004 at 24% (Government of Azerbaijan, 2022). A sharp decline followed, with spending bottoming out at 8% in 2011. Despite education reforms announced after 2013 and the adoption of a State Strategy, expenditure in 2016 only partially recovered to 9-10% (Government of Azerbaijan, 2022), demonstrating the lasting impact of the decline. The aftermath of the USSR's dissolution, the war with neighbouring Armenia, and the burden of nearly 1 million refugees devastated an already

strained education system. This crisis made it nearly impossible to secure funding for essential elements like infrastructure, teacher training, materials for preschool and general education, and even higher education - not just for the VET system. The decision to cut education spending was not solely a World Bank proposal; it was a choice actively supported by local decision-makers. As indicated by the *Former high-rank official of the Ministry of Education*:

If you pay attention to the country's actual investments in education in those years, if you compare it with the investments allocated to other fields, if you monitor the loans allocated by the state, in addition to the loans allocated by the World Bank and the European Development Bank to Azerbaijan, you will see that the education sector as a whole is the allocated least amount. I was in a high position at that time. I raised the issue every time in the Cabinet of Ministers. Although we know that it is the greatest need and everything depends on education, no investment was allocated to this field from the state budget, or little was allocated.

Unsurprisingly, the lack of financing hit the VET sector hardest. Interestingly, the VET sector lacked a separate budget allocation until 2007; from 2006 onward, it received a designated share within the larger education budget. However, until 2016, this included budgets for initial vocational education and special secondary education (the latter primarily viewed as part of higher education - see context chapter). Thus, true VET funding remained isolated only from 2016 onward. Even considering the combined budget, VET funding constituted a mere 4-5% of education expenditure and only 0.3-0.4% of overall state expenditure up until 2019 (Government of Azerbaijan, 2022). Despite these figures being widely available in international reports, little action has been taken by donors or local policymakers to address this disparity.

This policy decision led to delays in reforming the VET system and hindered progress within the entire education system. As indicated by a *Former high-rank official of the Ministry of Education*:

The government considered that it was important to reform the general education system first. After this system is in order, it is necessary to make reforms in the system of higher education and then in vocational education. Based on this idea, investment in vocational education was not taken into account until that time. The only objective was to maintain the vocational institutions as much as possible, and it was unsuccessful after all. Many of them did not work. We merged main schools, and many buildings were given to separate universities.

Despite international reports highlighting education's role in building human capital (a theme is explored next), proposals to cut education spending created a stark contradiction.

In summary, the reduction of education financing had a profound impact on state policy, shaping subsequent decisions. Following these cuts, the government focused on reforming general education, a shift supported by two major World Bank projects (details in Chapter 3) in the field (World Bank, 2016). This pattern aligns with broader observations about the World Bank's use of conditional funding to promote specific policy directions (Edwards et al., 2023). The findings of this study suggest a similar dynamic at play, demonstrating the institution's substantial influence on education policies within Azerbaijan. However, as previously noted, the neglect of the VET system caused severe decline, hindering its ability to provide skills training. This underfunded VET system's inability to function as a skills formation system led both global and local actors to spotlight the issue of Azerbaijan's low level of human capital. This issue, which is discussed and analysed in depth next, became a significant factor triggering the reform of the VET system.

7.2.2 The problematization of Human Capital condition

External pressure from international organizations (World Bank, UNESCO, etc.), who emphasised the need to improve human capital in Azerbaijan, spurred policymakers to initiate reforms within the vocational education system. As highlighted in Chapter 4, a widespread narrative emerged in Europe and multinational organizations emphasizing the importance of vocational education for human capital development. This narrative specifically targeted Azerbaijan, as is evident in reports by the UN, the World Bank (pre-2006), the EU, and the European Training Foundation. However, the problematization of the condition of the VET sector by international players was not limited to just multinational organizations, but consulting companies such as McKinsey & Company and MHC International Ltd. that were contacted by government agencies raised the importance of VET for the development of economy and supply of skilled workforce, as well.

While the European Union itself didn't directly engage in Azerbaijan's education sector until the 2014 Education Support Programme, a specialised EU institution - the European Training Foundation (ETF) - was actively involved much earlier. This

aligns with the ETF's simultaneous work in other Eastern European countries, including the former Soviet Baltic states. As indicated by *Labour market experts*:

In 2002, Eduarda, a lady from the European Training Foundation, came to Azerbaijan; she had a meeting with everyone. I received a call that a lady from the European Training Foundation had arrived. They asked me to meet her. She was interested in the labour market through vocational education. We came and talked, so our contact was very good. Previously, the European Training Foundation had an observatory in Azerbaijan, situated in the Ministry of Education. They told me that there was that observatory for 3-4 years, but it was not active. They presented the project to that ministry several times, but it did not interest them.

ETF primarily relied on producing reports focused on vocational education, the economy, and the labour market to influence Azerbaijan's policies. Initially, before 2010, these reports were based on data collected by ETF consultants. Later, the ETF adopted the Torino Process (2010 onward), involving local stakeholders in data collection, organization, validation, and report creation (European Training Foundation, 2012). Despite this methodological shift, the core issue consistently highlighted in ETF's work was the development of human capital. As indicated in their reports:

Development of human capital is the main challenge facing Azerbaijan, and meeting this challenge is the solution to the problems of avoiding the threats of the oil curse and repeating yet another failure of a single-resource economy. A feature that (economies perform well in the global economy) have in common is that globalised economies have become knowledge-based economies that encourage and facilitate rapid change and adaptation to changing international market conditions and that place a high priority on skills formation (European Training Foundation, 2006, p. 17).

The same narrative was present after the adoption of the Education Support Programme in Azerbaijan in 2014 by the European Union, where it is indicated that:

Today, the education sector faces significant challenges in Azerbaijan. In the case of VET, the enrolment rate is low at around 11.2%, with more than 40% of young people in Azerbaijan entering the labour market with no additional or specialised job-related education. As such, non-oil sector development depends to a large extent on a workforce with a secondary school education (European Union, 2014, p. 5).

Another report by The European Training Foundation published in 2014 coincided with significant changes within Azerbaijan's Ministry of Education. A new team was appointed to lead educational reform, and importantly, the overall approach to

education shifted towards a strong emphasis on human capital development.¹² As indicated in the report:

The European Training Foundation (ETF) is an EU agency that helps transition and developing countries harness the potential of their human capital through the reform of education, training and labour market systems in the context of the EU's external relations policy and aimed at conduct evaluation of the State (Reform) Programme for VET. (European Training Foundation, 2014, p. 3)

The ETF characterised Azerbaijan's VET State Program (2007-2014) as a significant system-wide reform. However, the original program document did not explicitly frame it as such. The ETF's positive evaluation of the process likely stems from its institutional mandate, which emphasises supporting "transition and developing countries" in realizing their human capital potential through educational reform.

Additionally, the World Bank played a significant role in highlighting the state of vocational education in Azerbaijan, emphasizing its importance within the 2003-2005 State Program on Poverty Reduction and Economic Development (SPPRED). This World Bank-supported initiative explicitly articulated the following issue:

There is a mismatch between vocational education and qualifications that meet the requirements of the current labour market. In this regard, reforms in the field of vocational education are planned to be implemented (Government of Azerbaijan, 2003, p. 12).

The World Bank further problematised the issue, emphasising:

One of the key remaining challenges in 2008 was the low quality of skills of the labour force and the low capacity of the institutions training the labour force. At appraisal, the non-oil sector was dominated by an increasing percentage of low-productive jobs, which were predominantly in agriculture. This supply of low-skilled workers was mismatched with the demands of a competitive market economy. The education sector was not producing a highly skilled labour force, was slow to reform, and was facing important challenges of relevance, quality, access, and governance (World Bank, 2016, p. 2).

Furthermore, with the advice of the United Nations Development Programme (UNDP), MHC International Ltd was chosen as a consulting company, and a report was written at the request of the Ministry of Economic Development to examine how best to use the country's new oil revenues to achieve long-term sustainable economic growth in ways which benefit all segments of Azerbaijani society (Hopkins, 2006). The main discourse of the report characterised its emphasis on

¹² This nuance will be further unpacked in the next sections.

globalisation and building a "knowledge-based" economy that encourages and facilitates rapid change and adaptation to changing international market conditions and places a high priority on skills formation. According to the report:

Maintenance of a higher quality of TVET must be a matter of national urgency and must be central to education policy. Although there are conspicuous exceptions, the VET facilities and institutions that should be providing these workforce skills are among the weakest in the system society (Hopkins, 2006, p. 47).

The report came with a significant slogan, "Turning Black Gold into Human Gold", and many ministries and state officials were involved in the building strategy. However, unlike the expectations of those actors, the consultants highlighted in the report that:

Many young Azerbaijanis still are entering the labour force with inappropriate or insufficient knowledge and skills. Moreover, employers demonstrate a lack of faith in educational/training qualifications gained in many Azerbaijani institutions. Addressing this will require a concerted strategy across all educational levels, but nowhere more important than in the vocational/technical domain (Hopkins, 2006, p. 45).

So, in large part, most of the donors coming to Azerbaijan and advising the government to start reforms in vocational education are mostly concerned with developing a skilled workforce. As indicated by an *EU Technical assistance expert*:

You know this mechanism (demand from enterprises) was not there. So, I think that the reform was pushed more by donors coming in, analysing the state of the situation, and telling the government, OK, this is not working. You have to do something because unless you reform vocational education and training, you can never have smoother development and an economy, you know.

This is further supported by the Labour market expert:

In the framework of the project, there are also these donors. Everyone said that (vocational education and training) should be raised (reformed), but there were concerns. And everyone said that employers should participate in this system. But in practice, this process was very difficult. I know they closed several vocational schools and merged them at that time. In other words, they did cosmetic things within the projects. However, when the reports were written, and things indicated that had to be done, no one had the desire to allocate the finances for implementation.

Facing an economic dilemma, likely connected to reduced oil prices, the Azerbaijani government sought strategic advice from McKinsey & Company. The consultancy's task was to develop economic roadmaps focused on two key goals:

diversifying the economy away from oil dependence and developing human capital to support this transformation. The importance of the VET system was recognised as crucial to achieving these objectives. However, limited government funding was available to design and implement a new VET system. In late 2016, following a significant currency devaluation, Azerbaijan's president adopted the "Strategic Roadmaps for the National Economy and Main Sectors of the Economy." These roadmaps were heavily influenced by McKinsey's recommendations, which, like advice from other international donors, emphasised adopting "international best practices." By this point, the role of VET was once again framed primarily around supplying the labour market with skilled workers. As indicated in the roadmap:

"due to its interrelation with other economic sectors, vocational education and training will play an important role in the realisation of the potential of those sectors, and investments made in this sector will result in a multiplying impact on the overall economy (Government of Azerbaijan, 2016b, p. 3)

The development of Azerbaijan's VET sector was once again a top priority. This time, however, it moved beyond mere recommendations and gained significant momentum through a presidential decree. This decree approved the "Strategic Roadmaps for the National Economy and Main Sectors of the Economy", a document that provided concrete timelines and comprehensive planning. Significantly, one of the roadmaps was specifically dedicated to the development of VET in Azerbaijan. As indicated by the *VET Strategic RoadMap developer*:

I think there were two actors. This one was a top-down presidential office, but the second was the Minister of Education at that time. He was a very progressive leader. I'm pretty sure he was making the importance of vocational education clear because he was coming to be Minister of Education with an economic background, and I assume he was the one mentioning how vocational education is central and cross-cutting for this sectoral growth. So, there are these nine sectors, but to grow all of them, you need vocational training. So that's why it was, I think, Minister creating arguments, and you know, later good news, it turned into a government policy, almost government strategy.

The release of these reports aligns with major developments both in Azerbaijan and worldwide. For example, the World Bank's report coincided with the 2003 election of a new president who made poverty reduction a central campaign promise. This focus on poverty is understandable given the results of a 2001 State Statistics Committee survey: a staggering 49% of Azerbaijan's population was living in absolute poverty (a monthly income below \$25.8), with an additional 17% in relative poverty (a monthly income below \$15.5) (Government of Azerbaijan,

2003). During the period leading up to 2005, the Azerbaijani government's top priority was addressing the alarmingly high poverty rate, which exceeded 60% of the population. VET was seen as a crucial tool in this fight against poverty. The MHC International Ltd. report was released in 2007, following a period when Azerbaijan experienced a significant boost in revenue due to oil and gas exports. This influx, coupled with the president's declaration, marked the nation's completion of its transition to a market-based economy (AzerTAc, 2009).

International donors consistently highlighted the importance of Azerbaijan's VET system in their reports following various crises within the country. They recognised the VET system's role in helping the government overcome a remarkably wide range of challenges, initially focused on reducing poverty but later extending to the need to diversify the nation's economy.

As indicated by a Former ranked official of the Ministry of Education:

Vocational education has always been included in the framework of the reforms we carried out with the World Bank regarding the development of education, but due to the lack of funds, the main funds were allocated to the development of general education. For vocational education at that time, the country did not have such serious resources to allocate to this field, and the loan allocated by the World Bank was very small. We allocated it mainly to pilot projects carried out in secondary schools.

Overall, Influential donors like the World Bank and the European Union underscored the broad significance of VET in Azerbaijan. However, their primary focus centred on economic considerations, particularly the development of human capital. This emphasis, as Verger suggests, aligns with broader "Global education agendas" where multinational organizations play a role in both identifying problems and proposing solutions (Verger, Novelli, et al., 2018).

This study discovered that the way Azerbaijan's human capital situation was framed as a major barrier to economic growth aligns closely with how international organizations often set agendas in developing countries and influence how educational problems are defined, emphasizing human capital development as key to global economic competition (Grek, 2010; Steiner-Khamsi, 2010; Bartlett & Pagliarello, 2016). This study's findings show how this global focus on human capital shaped the way Azerbaijan's structural challenges were viewed.

The EU was particularly active in promoting this human capital-focused development approach, highlighting the importance of VET in fixing structural

economic problems (Valiente, Capsada-Munsech, et al., 2020) and boosting competitiveness (Serban, 2011). Global consulting companies echoed these views, further reinforcing the sense that the human capital issue was urgent and validating the solutions promoted by the EU.

However, despite the VET sector being a focus for the government and the push for change from international actors, significant VET reform didn't begin in Azerbaijan until a deep domestic sense of crisis emerged. This crisis centred on a perceived shortage of skilled workers. It was this internal pressure, more than the external one, that ultimately sparked VET reform.

7.2.3 Skills shortage

The internal factor that triggered VET sector reform was mainly put on the agenda of the government by the demand for skilled labour raised by local stakeholders such as the Ministry of Labour, as well as large public and private companies. This initiative had already received the support of international actors, as previously indicated. Demand for a skilled workforce was raised within the “*Sustainable (balanced) development*” narrative (Government of Azerbaijan, 2003, p. 5), which was in accordance with provisions of the World Summit on Sustainable Development, held in Johannesburg, South Africa in 2002, aimed to reinforce and reinvigorate the global commitment to sustainable development ideals (United Nations, 2003). This discourse was mainly initiated in the State Programme on Poverty Reduction and Economic Development in the Republic of Azerbaijan for 2003-2005, which was developed with the support of the World Bank. As indicated in the document:

Regional differences in the standard of living are related to the unbalanced nature of economic development in recent years, and ensuring balanced economic growth is important in promoting the development of the non-oil sector and creating new jobs, especially in the regions outside the Absheron Peninsula (where the capital Baku located (Government of Azerbaijan, 2003, p. 14)

The development of the non-oil economy required a skilled workforce, which was also raised in the Employment Strategy of the Republic of Azerbaijan (2006-2015). As indicated in the strategy:

The economic revival and development prospects observed in the country in recent years imply technical modernisation of production and, accordingly, make new demands on the professional and technical level of the workforce” (Government of Azerbaijan, 2005, p. 3).

Hence, with the aim of developing the non-oil industry and, in particular, agriculture, services, and industry sectors, the government understood the importance of vocational education and training sectors. The demand for a skilled workforce started to appear afterwards. As indicated by *the Former VET Agency manager*:

That is, when the oil revenues came, it was seen in the implementation of these investment projects that there were no professionals in many technical areas in the country. There was a certain need in the industry when I joined, and I'm sure before me. When we say industry, we are mostly talking about the oil and gas sector. In other sectors, some specialists from the Soviet time were still present, but it was felt that they were already ageing.

The former VET manager in the Ministry of Education further highlighted the importance of the VET sector when he indicated that:

But after a while, it was necessary to put the funds obtained (in the oil sector) in other areas. It was necessary to create new enterprises. That is, you yourself know that one of the main means of stimulating investment is the workforce.

The regional VET school manager also supported the idea of the need for a qualified workforce when he emphasised that:

At the same time, they realised the necessity for vocational education. Due to the fact that the vocational education system was not functioning properly, it was found that there were no skilled workers for the lower segments of the economy. For example, large companies were invited to Azerbaijan at that time, and economic processes accelerated. After the acceleration of economic processes, the challenges started to emerge. What was this challenge was the lack of a qualified workforce for the lower-skilled technical occupations.

In summary, as indicated by the EU expert:

Azerbaijan realised that the oil and gas industry was not the main player going forward and that there would have to be some diversification of the economy away from dependency on oil and gas resources. I think that was the main trigger that the government said they would have to diversify the economy. And that required what we call the human capital approach. Skills were very low at that particular time, and they were focused exclusively on the oil and gas industry. So, the trigger really was not influenced by donors. They tried, and they had very little influence up till such time as the government realised that they would have to diversify the economy away from oil and gas.

Overall, when the oil revenues arrived and the government decided to initiate reforms in other sectors of the economy, it faced skills shortages. The

problematization of the skilled workforce by local actors was in line with Verger's conceptualization of the trigger as "Key stakeholders perceive profound education problems" (Verger, 2016, p. 30). Interestingly, the local industry that needed a skilled workforce didn't articulate any necessity with regard to developing a VET system to supply a skilled workforce. On the contrary, most of them favoured a university-educated workforce¹³. Nevertheless, since the framing of the problems was primarily formulated by multinational organizations, the solutions to those problems would come as a package or as indicated by Verger, as a global education policy. Hence, the next section unpacks the nuances of the selection of a particular VET model, as well as the drivers that led to the formulation of the new VET policy.

7.2.4 Migrant workforce

Yet another factor that influenced the variation phase of the policy change in the VET sector was the policy of the government to increase the inflow of the migrant workforce to tackle the skills shortage issue in the labour market. The first inflow of expatriate workers happened at the beginning of the 2000s when the oil and gas extraction started. The first expatriates were British; British Petroleum (BP), being a primary actor in the oil extraction sector in Azerbaijan, pushed forward. Although Azerbaijan had an oil industry that was even functional during Soviet times, the cutting-edge technology and expertise for the newer generation of facilities required a new type of competencies. The inflow of expatriates to the oil and gas sector was not really resisted by the government or labour market participants because everybody was aware of the importance of the oil exportation project. However, by the end of the 2000s, the oil industry's dominance in the economy was the source of the government's primary challenge, as this sector was a smaller employer due to its capital-intensive nature. Thus, two main challenges raised the importance of the VET sector at this stage. First, the decision-makers raised the issue of sustainable development, where the non-oil sector had to be developed for more balanced economic growth. Second, oil income boosted the construction and services sectors, where skilled workers were also scarce. Since the VET sector was not able to meet the demand, the government and businesses addressed the issue by attracting immigrant workers,

¹³ Next sections unpacks the inclination of employers towards higher education.

which created further concern in the local labour market. As indicated in the Employment Strategy:

One of the problems in recent years has been the existence of a foreign workforce in the labour market. The expansion of the scope of migration processes has made it important to address a number of issues that are new to the country. In this regard, appropriate measures have been taken to safeguard the interests of the Republic of Azerbaijan, prevent illegal labour migration, protect the social welfare and rights of working migrants, develop local standards in accordance with the requirements of the labour market, and ensure the full use of foreign labour migration opportunities in the marketplace (Government of Azerbaijan, 2005, p. 4).

So, after 2007, as a result of an oil export boom, Azerbaijan turned into a migrant-receiving country, with the majority of migrants coming to the country for labour purposes and taking the management of labour migration to a new level. Following the adoption of the comprehensive migration legislation, the Migration Code, in 2013, the main principles on the labour migration quota (initially introduced in 2010) were set in the Rules of Establishment of Labour Migration Quota (the Regulation of the Cabinet of Ministers dated 14 March 2016). In parallel to Azerbaijan's economic growth, the foreign labour quota increased by 12% between 2010 and 2014. This was mainly due to the development of the construction sector and subsequently increased quotas for this sector (37%) (Hosner, 2018).

To address economic difficulties, quotas for foreign workers have been steadily reduced since 2015. The 2017 quota represents only 62% (7,290 workers) of the 2014 allowance (12,000 workers). The construction sector has experienced the most significant cutbacks; the 2016 quota was just 70% (4,000 workers) of the 2014 allocation (5,650 workers). Despite these reductions, the available quotas were consistently been fully utilised since 2012. Official government statistics indicated that approximately 48% of these foreign workers were classified as semi-skilled or skilled labourers (Siegel, 2017).

The demand for skilled and "semi-skilled" foreign workforce remained high, especially in the construction and mining sectors. So, although foreign labour quotas were mainly allocated to the construction and mining sectors (more than 70%), they were used in the manufacturing, accommodation, food processing, education, and transportation industries. Clearly, the need for qualified workers was as high as ever before, but as previously indicated, the state of the VET system was unable to supply the labour market with the necessary workforce. As indicated by the *Ministry of Labour representative*: "You, yourself, know that even in the

early years of oil contracts, we brought welders, professional welders from abroad". The short-term solution to migrate the skilled workforce was mainly demanded by big companies, but the government realised that this solution not only would not solve the problems but may also create additional issues. As indicated by a *Former VET Agency manager*:

I remember that at that time, specialists from China, India, Bangladesh, and Pakistan came to us, and after those specialists arrived, the government somehow began to understand this as an issue at the level of the country's leadership.

The idea was further highlighted by the *Former ETF representative*:

A lot of things were happening there for which you need skilled workers. They were imported, which was also risky because these people had been brought from abroad. You didn't know what they came up with, what ideas, what kind of situation they would create?!

The government's attempt to address skills shortages by bringing in more foreign workers created a troubling contradiction. While this policy was implemented, youth unemployment rates were rising significantly, becoming a major issue in the labour market. A staggering 69.1% of all unemployed individuals were citizens under the age of 35. The situation was particularly dire for young adults aged 20-24, who faced an unemployment rate of 23.8% (Government of Azerbaijan, 2005, p. 4). Demographic shifts placed significant strain on the government. This pressure became a key factor in the decision to reform the VET system. The specific details of this reform are explored in the following section.

7.2.5 Demographic change

Overall, the demographic situation and, in particular, the increased youth population was another factor that triggered the reform of the VET sector. During the last ten years of independence (1990-2000), the country's population increased by 12.3%, from 7,131,900 to 8,016,200, and in 2007 the population was 8.6 million and 5.8 million, 67% of the population was working age (Government of Azerbaijan, 2008a). By 2007, 26% of the population was between 19-34 years old, and this made 67% of the working-age population (Government of Azerbaijan, 2008a). The main challenge the government was facing was the distribution of youth after the 9th-grade compulsory education. In particular, every year, about 100000 people exit compulsory education, about 30% continue their education in general education, and about 15% go to initial vocational lyceums. The remaining

60% was entering either the labour market or was in the "not in education, employment or training" (NEET) group (Government of Azerbaijan, 2008a).

Analysis of the educational attainment levels of the employed population, based on the labour force survey 2003, further clarified the problem, which also affected the labour market. The overall educational attainment of the employed population was 51% who had completed secondary general education, 19% completed higher education, 13% completed secondary technical education, and 7% completed primary (preliminary) vocational education (European Training Foundation, 2006). To better understand these numbers, it is important to consider the distribution of students by education subsector in 2003, which was 90% in general education, 6.4% in higher education, 1% in primary (preliminary) VET and 3% in secondary VET (European Training Foundation, 2006).

Thus, the findings of the data indicate that the government's aim in starting the VET reform was also to expand the VET sector to accommodate more students after 9th grade. The problem the government faced with unskilled people in the labour market or NEET was also a social tension that might increase the crime rate, as well as the unhappiness of these groups and their families with government policies. Thus, the government also wanted to limit admission to higher education with the idea that it was harder to cope with unsatisfied groups of people with higher education degrees than with lower education segments of the population.

The issue was also emphasised by the *Ministry of Labour representative*:

That is, after the contracts in the oil field, a certain period of revival began, and if we look at the demographic situation in those years, if I am not mistaken, 100,000 young people graduated from the ninth grade every year. About 35,000 of them went to higher education. There was little orientation to secondary education and Vocational education. Here, 50 per cent or less entered the labour market without skills. They were pointing in some direction, Which, in these times, would create risks for certain subsequent years. And I think that from that time, the government started to think that, in fact, things should be done in the direction of directing them to vocational education.

The matter was further clarified by the *Former VET manager in the Ministry of Education*:

This is a political issue. In other words, there were 100,000 graduates per year. Allowing all 100,000 of them to take the exam in higher education institutions was a danger in itself. In a good case, 50 per cent could be sent

to higher education. 25 to 30 per cent have made it to study with a state scholarship. Of those who remain on the ground, 50000 are students. What should they do? This is a political question. So where should these people go? What to do? Where will it be placed? An alternative must be found.

The logical solution to accommodate people who did not want to continue their education was to direct them to vocational education and training. At least, this was the historical policy that was utilised during the USSR times, as well. As a *Ministry of Economy representative* indicated:

Even during the USSR, the approach was built in such a way that vocational education was a policy to ensure the enrolment and employment of the lowest classes of people. The weakest students, as we say, always went to vocational education. A system was formed to gather children in any institution so that they do not remain on the streets. Such was the approach to vocational education.

Thus, the objective of directing people to VET was not mainly motivated by creating a skilled workforce and reducing the migrant workforce but rather, as the *Employer Confederation representative* stressed, to fabricate the temporary solution "to somehow keep the crowd engaged".

In essence, the government's vocational education system served a dual purpose - not only to foster economic growth but also to address political concerns. It is important to note that the development of human capital was not the sole, or even the primary, objective of VET as stated in the Law on Education and other governing regulations. Rather, the government placed great emphasis on cultivating good citizenship, which was evident in the VET policy's focus on civic education. This approach proved effective in encouraging individuals to continue pursuing VET education (Government of Azerbaijan, 2009). This idea was further supported by the fact that the main quality indicator for VET institutions that was set by the government was student attendance number per school. The government was asked to ensure people were in school during study hours. As indicated by the *Regional VET school manager*:

For vocational education, there is no one criterion to measure the quality of education. They say to secondary schools, this indicator is how many students scored more than 600 points in state exams and how many won the Olympiad or so many students studied abroad. But what is the quality indicator for VET institutions that the government measures its effectiveness? With what argument is one called good and the other bad? We still evaluate the vocational school based on the attendance of students here. This is, frankly, our misfortune. If we say well done because the school attendance is still 80 per cent, in others, it is 40 per cent. So, we still have not developed a systematic manner because we are still checking

student attendance in classes. That is, we do not have a tool for measuring quality criteria in VET.

To summarise, the increase in the youth population created tension for the government. On one hand, a large percentage of the youth entering the labour market were unskilled, having only completed compulsory education up to 9th grade. This impacted economic development and led to an increase in migrant workers in the labour market. Additionally, the high rate of youth unemployment or underemployment was a social and political concern, as it increased the risk of criminal activity and led to citizen dissatisfaction with the government. International actors suggested developing a VET system to train young people to replace migrant workers, but public perception of the VET system was another challenge that the government had to overcome. This issue, which influenced the policy process, is unpacked in the next section.

7.2.6 Negative Public Opinion

Public opinion can play a significant role in shaping policy change, particularly when there is overwhelming public support for a particular policy or issue. However, the opposite can also be true if the government takes advantage of a situation where the public is not necessarily interested in a particular area. As a result, the primary factor that influenced the variation phase of the chosen policy objectives was the dominant narrative that vocational education was a legacy of the Soviet system and the only education pillar that had not completed the transition to a market economy structure. This narrative highlights the negative connotations of the Soviet past, although some interviewees noted positive aspects of the Soviet VET system and its development in Azerbaijan during that time. Nonetheless, the narrative of "out with the old and in with the new" to justify the actions taken for modernization prevailed. As indicated by a *Ministry of Economy representative*:

We used to have a centralised management system left over from the USSR period. When that system completely broke down in the 90s, it affected both the country's foreign and domestic relations. As a result, some areas were deemed no longer necessary, and one of those areas was vocational education. We believed that we no longer needed vocational schools, as they mostly prepared staff for factories and farms and trained workers and tractor drivers for collective farms. However, since the collapse of the system, enterprise structures have also collapsed to a certain extent. As a result, it was said that vocational education would no longer be needed.

As noted earlier, the initial effort to reform the VET system in 2007 did not result in significant changes and primarily involved introducing new elements within the existing framework. While this conservative approach was favoured by schools and the Ministry of Education, it did not meet the expectations of higher government officials or multilateral organizations. The goal of the new system was to systematically move away from the Soviet-era approach and establish a modern system based on the best practices from around the world. As indicated by an *EU technical assistance expert*:

My first project in that part of the world was in 2010, although I had to check my CV to confirm the exact year. At that time, the working style was very Soviet-like, which was noticeable in Azerbaijan and, to some extent, in Georgia. Comparing it with the Russian system where I had previously worked, it was almost the same thing.

However, scrapping the old Soviet VET was not only a material dilemma that would require a shift of the institutions and economy to adjust to a capitalist market economy. The aim of the Ministry of Education was to initiate the reform of the VET system and bring the argument because the inheritance of the Soviet past was not effective in bringing it to the government reform agenda. This was also because the VET system was not just a skills development system during the Soviet times. It was also an indicator of a social class or a social pillar. As indicated by an *EU representative*:

I would say the second weakness is rebranding, increasing the influence of vocational education. People should move away from the Soviet era because they were a vocational school for the losers. And his image needs to change.

Like in many post-socialist countries, the image of VET was not bad because it trained the low-quality workforce or didn't give this workforce the mobility to further within the labour market or education system. The image was mainly a psychological or even cultural issue in which the VET system was connotated with low social class. Thus, by transitioning to a market economy, the people were hopeful of gaining more control in their lives and removing the low social class tag from their families. This was a challenging factor not only for the government but also for the donors who were calling to reform the VET system in Azerbaijan. As indicated by *the ADB representative*:

The VET system in Azerbaijan was never seen as a second chance. It was seen as an alternative but not a second chance. Fit wasn't just for people

who can't succeed in academia to be sent to VET. So, you know, that was a cultural sort of shift from head-to-head.

A similar point was made by the *Ministry of Economy representative*:

During the Soviet era, attitudes toward the Soviet Union were also established in such a way that vocational education was a policy of ensuring the lowest level of employment. As we have always said, two buyers, the most vulnerable students, went to vocational education. A system that has been developed to accommodate children in any institution so that they don't have children on the streets. That's what happened.

The negative portrayal of VET was not the sole determinant in the decision-making process regarding educational pursuits. It also played a pivotal role in the recruitment process, where potential employers considered this perception while selecting their workforce. As indicated by the *Former VET Agency manager*:

Unfortunately, at that time, strategic vision was shown at a very high level of the government, but there was no will that suddenly we would shift from general education to vocational training. There was a sense at the state level that vocational education was important, but at the public level, there was no need for it. When we refer to the public, we refer to employers as well. Employers themselves, when speaking, are mainly concerned about people coming from higher education rather than VET.

In essence, the government's main objective in reforming the VET system was not centred around equity or equality. Rather, it aimed to keep youth off the streets and promote their loyalty through education. In light of this, the VET system remained the most effective means of catering to this demographic.

In conclusion, with regards to understanding the dominant factors that triggered the VET reform in Azerbaijan, the analysis of data indicates that the donor organisations, in particular the World Bank until 2006 and the European Union afterwards, highlighted the importance of the VET system for human capital development and encouraged the government to initiate the reforms in the system. However, the government did not start the reform until it faced a skills shortage issue after the oil boom when trying to develop non-oil sectors of the economy. The migrant workers further created tension, and the development of VET to supply the labour market with a skilled workforce was the main motivation after the pressure from big businesses and international actors. The government was also facing political pressure after the demographic increase in the youth population. The distribution of youth after compulsory education was under political pressure, in particular when the government did not want massive higher

education enrolment and aimed to expand the VET system to accommodate more people from lower-income segments of the population. However, the “image of VET” was a strong challenge that was entangled by deep sociological and psychological roots that went back to the Soviet times.

7.3 Selection - EU-Influenced Solutions and Local Resonance

The previous section (Initiation phase of policy process) highlighted significant factors that triggered the VET reform in Azerbaijan, which included a combination of external pressure from multilateral organisations and pressure from the industry because of skills shortage. This section describes how the government identified the main courses of action to tackle the challenges and explains the causes of the particular preferences to select the EU-backed VET model as a valid policy solution that was identified. This section describes the Cultural Political Economy framework's Selection phase, which involves the expression of preferences for certain concepts to explain occurrences and legitimise actions (Jessop, 2010). The findings of data analysis indicate that the selection of policies was internally influenced by paradigm change in the government towards the VET system with the change of the team that was responsible for the education system. On the other hand, the external factor explaining the motivation for adopting this VET model was its branding as a global policy solution or best practice and accessibility for decision-makers at the particular time period.

7.3.1 Paradigm shift

Thus, the major ideational factor that affected the policy adoption was the assignment of the role of Minister of Education in 2013 to a person who was young, western-educated and previously held the position of deputy minister of economy. This appointment changed the role of education in Azerbaijan to the human capital objective. Additionally, his clear preference for Europe as a model for education standards was clear by the unambiguous indication of the aim of the government to adopt EU standards in education, which are indicated in the Education Strategy (Government of Azerbaijan, 2013).

Overall, after the 2007-2017 VET State Program completion, the government was not happy with the approach of the Ministry of Education to the reform of the VET, so it did not extend the State program to a second stage, but rather the Minister of Education was dismissed, and a new Minister was appointed in 2013. What was obvious during the design of the previous *VET State Program 2007-2012* was that

MoE did not intend to reform the VET system but rather build the new system on the "ruins" of the old. This would not require dramatic changes such as the closing of VET institutions, dismissal of teaching personnel, changing curricula and redistribution of new subjects and teaching hours that the schools would resist. The intention was to keep the old way of doing business and try to adjust the novelty of the system. As indicated by a *Former ETF representative regarding the VET State program*:

But also, in this whole head strategy, the budget was not there, the investment didn't happen, and the investment happened for different reasons. The strategy and the ideas were not bad. But it wasn't done. So, there was something else done. Then, there was also a proposal for a new education reform, which I think was in 2013, but it was not adopted by the President. They refused it. I think the President decided that the people who presented this were not the ones who would do it, and the ideas, therefore, should be reevaluated. So, then the new Minister was nominated.

The new Minister had a new vision toward the VET system and intended to "integrate the VET to industry". The plan of the Minister to rebuild not only the VET but also the whole education system was reflected in the State Strategy for the Development of Education, the first document that was developed after his appointment and adopted. The strategy indicates that:

The implementation of the strategy will enable the reconstruction of the content of education, personnel training, educational management system and educational infrastructure in accordance with advanced international practice and the development concept of Azerbaijan and will ensure the establishment of a knowledge-based economy in the country, the formation of an information society and the sustainable development of the country (Government of Azerbaijan, 2013).

The document was significant because, for the first time, it clearly indicated that for the development of human capital, there is a need to adapt the quality indicators of education to European standards. The reasoning behind this decision was unpacked as globalisation processes require the integration of education systems of different countries, and Azerbaijan would accept as the target the group of competencies recommended by the Council of Europe (Government of Azerbaijan, 2013). This document was a clear indication that the intention of decision-makers (at least at the MoE level) was to rebuild the education system based on EU standards.

The same strategy was also applied to the VET sector, and the first initiative of the newly appointed Minister was communicating with international donors, as

well as with some international organisations, regarding support for the Ministry in reform initiatives of the VET system. The EU delegation accepted the request for assistance, and a consultant was contracted to assess the situation and propose a solution to both the EU and the MoE. As indicated by *the EU expert*:

So, the conclusion I came to for the EU delegation is that, no, the ministries were not capable of interpreting or forming their own strategy and implementing a strategy for VET and that the idea of establishing an agency that would have responsibility for vocational education would probably be the right choice. I believe the Ministry should have some aspects of policy, but the execution of that policy should be the establishment of a VET Agency or some agency to take responsibility for it. I think we had my first thinking was That both ministries should establish one Agency that will be responsible for employment services, responsible for vocational training and responsible for what we call skills development in enterprises, a kind of advisory service to the employer, If you like, or to industry for upgrading or upgrading human capital in the industry.

The idea of establishing an agency that would be responsible for the VET system was accepted by the MoE with great enthusiasm, and soon, in accordance with the President's Decree, the State Vocational Education Agency was established in April 2016. However, unlike the recommendations, the Agency was established under the Ministry of Education. So, although the VET Agency was established, those recommendations by the EU consultant were not accepted because, as an *EU expert* states:

I wouldn't say conflict, a power struggle that was going on between the various Ministries and the various ministers. So, they were separated, and that's why vocational training became independent from employment services and stood out within the agency on its own.

EU delegation and ETF did not see their expectation were met, but there was an agreement that this approach was not ideal, but it would be the starting point in maybe getting vocational education together. On the other hand, the argument of local actors for keeping the VET Agency under the MoE was straightforward. As indicated by the *High-rank official in VET Agency*:

Because there were only state vocational education institutions, there were no private institutions. There should be a point to regulate them. Such an idea was made then Mikayil Jabbarov (new Education Minister), and country leadership supported this idea that the governance of all vocational educational institutions should be carried out in this form, in the form of a separate agency under the Ministry."

So, the argument that the new Agency should be under the MoE because most VET institutions were public and they are under the MoE accepted by some, but other

ministries, as well as industry representatives, were pessimistic about the changes in this framework.

To summarise, the newly appointed minister spearheaded a paradigm shift in the field of education, particularly in vocational education, with the goal of aligning education with the demands of the labour market. This vision was in line with the EU's objectives for Azerbaijan. In order to implement this reform, the VET Agency was created with the mandate of restructuring the VET system according to international best practices. However, the primary challenge of this development model was the limited state budget. The EU and private consulting firms such as McKinsey & Company provided recommendations based on best practices, which are discussed further in the following section.

7.3.2 Role of the Institutions

The reform of the VET policy was assigned to The Ministry of Education, but the community and the ministry itself prioritised general and higher education instead. This led to a diversion of resources from VET, exacerbating the issue of a lack of capacity to address labour market and economic concerns. While the minister had an economic background, the administrators in the MoE lacked expertise in this area and had limited knowledge of modern skills development systems. Furthermore, the VET Agency's placement under the Ministry of Education limited its ability to engage with other stakeholders, such as employers, government agencies, and international partners. As the Agency lacked independence, its implementation was constrained by the Ministry's vision.

Nevertheless, the Ministry of Education was charged with the implementation of the Program. Overall, the Ministry was assigned the task of rebuilding the VET system and making it work to supply a skilled workforce for the country's economy. However, this idea, which looked rational on paper, faced significant challenges in reality. Firstly, the Ministry of Education did not have any human resources or the necessary capacity to reform the VET system to make it function as a skills formation system. Secondly, there was a gap between education and industry at that stage because other players, such as the Ministry of Economy and Ministry of Labour, which were significant players in bridging this gap, were not assigned any major role in rebuilding the system. As indicated by the *Manager in the Ministry of Education*:

That is, these reasons slowed down the implementation of serious reforms related to Vocational education in the first years of independence and until 2007. At that time, yes, that Program was prepared by the Ministry of Education and, of course, at the initiative of the country's leadership. However, we could not fully achieve the goals of that program, and they were not achieved. Many of the works envisaged there could not be implemented due to the lack of significant funding.

The Ministry of Education (MoE) was tasked with implementing the reform, leading them to prioritise investment in areas where they have direct control, such as infrastructure and books. Unfortunately, this approach neglected crucial policies that require involvement from other relevant stakeholders to build a robust skills formation system. As indicated by *the Ministry of Economy representative*:

There was inertia in the VET system. It is a pity that we see changes in this field not after the realisation of this State Program but much later in 2015. In fact, if the implementers of the state program of 2007 had approached it more realistically and examined it from a strategic point of view, the Law on Vocational Education would have been adopted in that period, and the opportunities related to the financing of the sector would have increased and multiplied. Therefore, the implementation of that Program itself had a formal character.

Overall, when the main objective for the VET development was set as integrating employers into the VET system, the best practice mechanisms that were borrowed and adopted in the Law of Vocational Education mainly relied on the European model. Since European consultants were also engaged in the development of the Vocational Education Law, the VET regulatory framework as a result of the reform was shaped as a demand-led (enterprise-led) (Powell et al., 2012) system where the labour market or the industry was in the centre of the system, and the role of the educational institutions was meeting this demand by training a qualified workforce. However, the supply-led structure of the education culture in Azerbaijan, as well as the government-led policy process and centralised decision-making type of governance, resulted in a contradictory mechanism being in place. Additionally, the two main players of the demand-led system, the education institutions and employers' participation in the policy process, were limited (Green, 2013). Consequently, as a result of the reform, a demand-led VET system was developed in the country where the education system was supply-led with limited power distribution and decentralisation.

7.3.3 Availability of international best practices

It was clear that the upper levels of the government recognised the significance of the VET system in promoting economic development. Despite this

acknowledgement, financial limitations prevented the government from allocating a substantial amount of funding to a sector that is considered to have a less than favourable reputation. As the country prepared for general reforms in light of the impact of plummeting oil prices, policy entrepreneurs and donor organizations emphasised the importance of VET in driving economic growth. As indicated by the *High-rank officials in the VET Agency*:

(Everybody recognised that) If you want to turn around the economy, if you want to carry out the reforms in a radical way everywhere in the industry and tourism, then there must be reforms in the vocational education

Thus, by 2016, the VET roadmap established the main direction for the development of the Vet system by aiming to "integrate employers with vocational education and training system" (Government of Azerbaijan, 2016b). The integration of employers into VET was set as an objective by the government, but the mechanisms of that integration had to be taken from international best practices. The challenge was to identify the mechanism by which the government's financial burden would not be significant. The solution came from the European Union's best practice or as indicated in the literature review, the "European VET model".

The availability of the EU's best practices in the vocational education and training sector, specifically its previous experience in the case of Baltic states, was a significant factor that influenced the preferences of decision-makers. At the central level, the EU's approach to Azerbaijan was similar to that of all the Eastern European nations transitioning to the market economy. EU applied a similar policy to Azerbaijan to support the reform of the VET sector, giving ETF the primary duty while concentrating on institutional and policy change through its soft mechanisms. The EU was primarily concerned with synchronising qualification systems so that people in Azerbaijan and other Eastern neighbouring countries could participate in the labour market. However, as an *EU Technical assistance expert* said:

Well, usually, you would say that the pressure for reforms will come from the customers, you know, and the customers that they are businesses. So, in theory, the businesses would push the Ministry for reforms because they would say, we do not have the people that we need, you know, the workforce. That was not my impression of what happened in Azerbaijan because this mechanism was not there at that time. So, when I spoke to businesspeople, you know, they said this is all "ujas" (terrible in Russian), you know, nothing works, and they, they are hopeless, you know, and you

spoke with the people from the Ministry, they would say the same thing about the business. So, you know, this mechanism was not there.

Hence, the EU, with enough evidence that the Azerbaijan government takes the VET reform process seriously, decided to develop a program to support this initiative of introducing international best practices in Azerbaijan. In 2014, the *Education Support Programme in Azerbaijan* was approved with the main objectives of contributing to the modernisation of the education and training systems in Azerbaijan, enhancing quality, equality, relevance and access in line with European standards and practices¹⁴ (European Union, 2014). Specifically, the aim was to enhance the quality and relevance of the education system with a focus on higher education and VET, increase the attractiveness and labour market relevance of all levels of VET and strengthen civic participation, governance and inclusiveness of the education system. However, even though the Program was adopted in 2014, the first projects were initiated only in 2016, at the same time as the establishment of the VET Agency and the development of the VET Roadmap.

The major EU-funded technical assistance project within this Program was EU Support to VET in Azerbaijan. As indicated in the project, with the overall objective to enhance the attractiveness and labour market relevance of the VET, it aimed at helping to improve VET policy and regulatory framework, establish multi-level management, including sector coordination at the central and local level, as well as to develop VET qualifications (educational standards) and curricula linked to occupational standards and introduce them in priority sectors (European Union, 2019). The overall objective was to integrate the employers into the VET system, but regulatory mechanisms for this integration had to be established within the Law on Vocational Education to bring about policy change. For this purpose, the EU agreed to fund a project to help and support the decision-makers in designing this Law and developing a system that would adapt the quality indicators of the system to European standards.

So, the key task of the project was to support the Azerbaijani government in the development of the draft of *the Law on Vocational Education*, following its adoption, and the design of the relevant bylaws and regulations. The best experience of Europe or the European Model of VET development envisaged work-based learning where the responsibility of both governance and financial support

¹⁴ There were similar programs in other Eastern Partnership countries but different in the content.

would be shared between skills utilization (employers) and development (schools) systems.

7.3.4 The work-based learning as a cost-sharing mechanism

Integrating employers into the VET system was the primary objective of both the VET roadmap and EU technical assistance projects. This was planned to be accomplished through a competency-based curriculum with learning objectives that should be developed in collaboration with businesses. The content creation was planned to follow the UK model, which stipulates that the curriculum should be built on professional standards that have been created and authorised by the industry (Powell et al., 2012). The system was also developed to include recognition of skills obtained informally. This was done in an effort to address the large number of job seekers who lacked proper credentials in the labour market.

Additionally, the VET roadmap intended to develop a mechanism for trilateral apprenticeship agreements between businesses, vocational education institutions, and their students. For the realization of this intention, the EU technical assistance project highlights:

The new concept for VET should focus on finding the best mechanisms and incentives for ensuring higher participation of the private sector and other social partners in VET. This should include the promotion of Public-Private Partnerships, apprenticeship and internship systems, work-based learning, etc. More generally, the involvement of the private sector in all stages of the VET system (including VET governance, curriculum development, and delivery of training) should be promoted (European Union, 2019).

The government found the involvement of stakeholders in the VET system attractive due to the potential for co-financing. To facilitate this, a new financing system was necessary, and the VET roadmap outlined the framework for this new system. As indicated in the document:

To reach this goal, public, private and international funding sources will be identified, performance-based incentives for vocational education institutions and teachers will be implemented to ensure the efficient use of funds, and a strong performance-based funding system will be formed.... Funding that is based on public-private partnership principles, provided by the private sector, supported by international donors and financial organizations, which is widely used in international practices, has been determined as one of the enablers to give an impetus to substantial changes in the vocational education and training system and to stimulate its development. This will also spur a reduction in the budget burden in financing the vocational education system, organise the activities of vocational education schools based on business principles, and ensure high quality and transparency (Government of Azerbaijan, 2016b, p. 27).

This mechanism for financing also included the creation of a fund for the promotion of vocational education, which was intended to encourage schools that met the KPIs set by the government. The sale of goods and services created by vocational education institutions was intended to serve as another method of financing VET. A diversified financing scheme for VET institutions based on key performance measures was also selected as a policy measure. In this line, the EU technical assistance project was also tasked with drafting a proposal on a new financing mechanism and further adapting it to the Azerbaijani VET system. As indicated in the project document:

It is widely acknowledged that investment in education, particularly in VET, brings economic benefits. Considering the current Azerbaijani conditions, where free market competition is limited due to a small economy and the existence of monopolies in many areas, market players are generally not in a position to understand and value the potential benefits of investing time and resources into VET.”... Thus, financing of vocational training is invariably to be considered within the Employer-Trainee-Public Interests triad. Government financing may be complemented and/or substituted in part through community financing (direct or fundraising) or, in development work, through donor financing. Each player in this triad contributes according to their own vested interest (European Union, 2019, p. 155).

Accordingly, the government was aiming to reform the VET system in a way that shares its cost with others. Since it didn't and couldn't allocate the funds to the VET sectors to restructure it as it was done in Baltic states with the help of the EU funding. As indicated by the *Former VET Agency manager*:

I believe that vocational education was among the priorities for the Ministry of Education, but vocational education was not in the top 5 priorities. It was almost in the 25th place as a priority. Because, in the end, general education funding is always the most important direction. Higher education also has its place, and preschool funding is also important. In that regard, when the state set priorities, it did not envisage the finances. Finances were never allocated. Nobody mentioned how the financing of VET will ever be?! The regulations and laws, like everything else, created very good, interesting directions and opportunities, but the financial possibilities were not considered.

Hence, although integrating employers into the VET system was indicated as a primary purpose, the government was attracted to this idea with the assumption that this mechanism would enable the sharing of the expense or financial burden of rebuilding and maintaining the VET system. As indicated by the *European Union (EU) representative*:

The proposal was to increase the financing of VET, "and here we are not talking only about the state. There can be 3-way financing here. Both by the state and economic actors and possibly partially self-financing".

Apprenticeships, dual training, and other similar enterprise-driven ways of VET provisions were very attractive to decision-makers since, in principle, they opened the possibility of co-funding the VET programs. However, culturally, as *the Manager of the Ministry of Education* said:

Both the government and society believed that people should be trained in the VET Institution and then they should go and find a job for themselves. There was no such approach in the labour market; employers and entrepreneurs engaged in skills formation and paid and invested funds for this.

7.3.5 Qualifications framework

As indicated in the previous section, the government's preference for the European model of VET included its main tool, the National Qualifications Framework (NQF). Hence, being the EU policy model in education, the NQF has been on the agenda of the Ministry of Education since 2010. Although the EU also financed the technical assistance project for its development, and ETF was lobbying policy entrepreneurs and decision-makers about its importance, there was strong resistance to the adoption of this mechanism in the Ministry of Education. As indicated by the *VET Agency representative*:

In the period between 2007 and 2015, the ETF implemented and monitored a state program. The ETF investigation found that some progress had been made, but it was not uniform across all areas. While there were improvements in the infrastructure and material resources of some schools, particularly in the northern region, the impact of the program was limited. This was mainly due to the absence of legislation for the NQF, which resulted in content-related issues. Therefore, the full impact of the state program was not realised.

Although the main objective of the NQF was not limited to the VET, it however encompasses the whole education and training system and aims to ensure the compatibility of national qualifications with international qualifications. The main task of ETF was to ensure that all the neighbourhood countries adjusted their qualifications to the European Qualifications Framework through the National Qualifications framework. The process of ETF introduction of NQF in Azerbaijan is reflected below from the interview with the *Former ETF representative*:

Then, in 2000, there was also the lifelong learning memorandum in the EU. And you know, so all these things became very important, and then it has taken many years for this to realise.... After that, we started with CEDEFOP

to provide an overview of different countries' qualification systems. Now it's called global inventory for national and regional qualification frameworks... out that followed up European projects which linked with that... So, Elvin (MoE representative) told me that you work from these NQFs. Is it something for us? I said well, you have to decide for yourself. It is not for us to decide. Yeah, so then, he said I spoke to the Minister, and he wants to have your representation about it; What it (NQF) is about for half an hour... So, I made this presentation, and then they said can you stay because we want to work on it? I said no. Then they said Can you support this process? I said well, I could possibly do some of the work, but I cannot do everything because I don't have so much time. I cannot work only in Azerbaijan; I cannot only work on this. This needs serious work. NQF is not an empty shell; it should be filled with qualifications. They should build on what's there and then subset, let's say, define what can be improved... And he said, can you make some terms of reference for this work to happen?! So, I made something, I made ToR. I told them that you can ask for any documents they want. I can send them to you. I can share them so you have a better understanding of the process. And then he said, can you help us find also experts?! I said, well, I can give you a few names, but normally we don't do that. Because, you know, we need to be neutral.

As previously mentioned, the EU-funded technical assistance project aimed to support the implementation and adoption of the NQF in Azerbaijan. The main objective was to establish the Azerbaijan National Qualifications Framework (AzNQF) based on the EQF, which included the structure of qualifications, credit transfer, and recognition of prior learning elements. As a result of this project, the VET system integrated these elements into its framework. It is worth noting that the policy entrepreneurs emphasised the importance of a market-oriented VET model and used the NQF as a reference. Despite the adoption of the AzNQF several months after the Law on Vocational Education, the parallel process of policy adoption had a significant impact on the VET policy change. Overall, the adoption of the VET Law on April 24, 2018, also triggered the adoption of AzNQF after two months on July 18, 2018.

To summarise, the appointment of a new Minister who prioritised human capital development led to a desire for reform and a search for solutions. This was concurrent with the promotion of certain VET models by influential actors such as McKinsey Consulting and an EU-funded program. The "roadmap" provided by McKinsey was instrumental in shaping the initial policy direction and supports the literature on the influential role of policy entrepreneurs (Edwards & Moschetti, 2021). Additionally, this aligns with Verger's findings on the spread of global education policies and the motivations of countries to transfer these policies to tackle domestic issues faced by the governments (Verger, 2014; Verger & Fontdevila, 2023). The EU program played a pivotal role in enabling

implementation through funding and technical support, likely in alignment with McKinsey's vision. Thus, Verger's framework reveals important factors, both soft and hard, that are influenced by global and local actors during the selection phase (Verger, 2016). Therefore, if a deliberate shift in education paradigms occurs on a local level, the selection of policies becomes crucial, as they are reflected in both the roadmap and education support programs. However, before the VET policy is crystallised in law and institutionalised by the actors, the selected or transferred model undergoes a process of "translation" or "recontextualization," as explained in the following section.

7.4 Retention - Adoption and Adaptation

The previous sections analysed the primary triggers and key factors that impacted the policy selection process in Azerbaijan. The findings indicate that donor organisations highlighted the importance of the VET system, a skills shortage issue after the oil boom triggering the reform in the education and training sector. To address these challenges, under the slogan of "building a knowledge economy," the government initiated the reform with the aim to "integrate employers into the system" and chose the "European model of VET" as a valid policy choice. Penetration of this model was facilitated by EU-funded technical assistance projects and grants, as well as the roadmap that was developed by an international consultancy company.

This section outlines the key findings from the analysis of data on the retention of the chosen policy agenda. These findings identify the factors that contributed to the integration of selected VET policy mechanisms into the regulatory framework and guided the development of the VET sector. The data analysis suggests that cultural and ideological factors, shaped by the Soviet past and Europeanisation, along with institutional configuration, played a crucial role in the retention of the policy. Retention is defined as the stage where communication is translated into action through the regular processes of an organization, incorporated into official rules, reflected in the physical environment and technology, and conveyed through commonly accepted methods of gathering and storing information (Jessop, 2010, p. 341).

7.4.1 The impact of policy champion on reform

As indicated in the previous section, the idea of creating a VET Agency was primarily proposed by EU experts and warmly accepted by the government.

Nevertheless, the original idea was to create an institution that would combine education, labour, and economic elements in one institution, covering employment services, vocational training, and services to industry. However, the decision to create the agency under the Ministry of Education was the ultimate decision by the President, and the authority to appoint the chairman of the newly created VET Agency was given to the Minister of Education.

The dilemma in front of the minister of education was significant. On the one hand, he wanted to start the reform of the VET system with the slogan of "integrating the employers to the VET" and adopting "European standards", which would require higher decentralisation and interinstitutional coordination, as well as "multilevel governance of the VET". On the other hand, he had to carry out all these initiatives by keeping the VET system under the umbrella of the Ministry of Education. The solution he came up with was delegating the position of chairman to the actor who had a business, academic, public administration, and economic background. He appointed a professor of economics who had a significant track record in public administration reforming the entrepreneurship sector as the director of the VET Agency. The newly appointed chairman was also a well-known and successful businessman who initiated a private company in the construction sector. The profile of the new director of the VET Agency made him a reform champion and further strengthened the institutional profile of the newly created VET Agency and the political power of the Ministry of Education, which was also an important factor in retaining the selected policy.

The minister further strengthened the power of the Agency by delegating three main tools of influence in the VET system: governance of the VET institutions, direct negotiations for donor coordination in the field of VET and the responsibility for the appointment of the school management. Thus, all the VET institutions¹⁵ would be directly subordinate to the new VET Agency. According to its statute, the Agency organises and coordinates the activities of VET institutions, takes measures in the direction of the development of the material and technical base and ensures the preparation and implementation of programs within the framework of state-business cooperation with employers (Government of Azerbaijan, 2016a). The Agency would serve as the primary point of contact for all donor organizations, including the EU, regarding VET policy. Consequently, following the establishment

¹⁵ Except the one private VET school.

of the Agency, the EU has engaged with the Agency to communicate any proposal and correspondence within the VET system.

Interestingly, although these tools gave great authority to the VET Agency and its chairman, they also caused the opposite effect of the decentralisation initiative. Thus, the appointment of the school managers would be made centrally without any prior consent from local and regional municipal authorities or the school staff. Hence, little or no decentralization was realised after the establishment of the agency; rather, the agency was to be a focal point for connecting with the employers. Similarly, the newly appointed VET Agency director was the focal point for the coordination of EU support in the VET system, as well as the key decision-maker about which policies, mechanisms and tools should be borrowed, translated and adopted. Even though he had a strong profile that combined economy, entrepreneurship, and academia, he didn't have any prior experience in the field of VET. As indicated by *EU Expert*:

The notion behind this is that the individuals in the Ministry of Education were typically civil servants and thus lacked adequate industry experience. Unfortunately, a similar mistake was made when the agency was established, as it was, to a large extent, staffed by individuals who lacked the necessary experience in vocational education and industry.

In addition, he lacked confidence in the Ministry of Education's prior team, as they had ties to past VET system initiatives. As a result, none of the key players from the 2007 VET state program reform was given roles in the newly established VET Agency. Only two personnel from lower ranks were appointed to the agency. This decision hindered the agency's ability to draw from past reform experience and knowledge, as well as to make informed decisions and strategic plans for the future. As indicated by the *Labour market expert*:

Our problem is the lack of consistency in maintaining the personnel's traditions. For example, a minister was replaced, and as a result, Namig Mammadov (former VET department manager in MoE) was fired. Then, another minister was appointed in the Ministry of Labour who brought in new personnel, leading to the termination of all the people working on those professional standards. In other words, there were personnel who had been working on these projects for a long time and had a certain level of expertise, but they all left their jobs and went their separate ways. As a result, newcomers have to start from scratch and learn everything all over again.

The reform champions argued that building a new system with old personnel was not possible and that only drastic measures could be taken to build a VET system

that would meet the demands of the labour market. Overall, the new agency was formed by a well-respected public figure with a significant profile but without any knowledge and experience in the field of VET. The same was applicable to the personnel of the VET Agency who lacked any capacity in the field of VET and any knowledge about the VET agenda in the world. This might be the significant reason why the EU's support was so welcomed and effective for the reform of the system. As indicated by the *Former VET Agency Manager*:

Building the agency from scratch was a process in itself. Sometimes, it is said that the agency was only created on paper and that vocational education should start functioning effectively the following day. However, the staff of the agency had to learn things on their own. The agency itself should learn what it is, how to operate, how it was managed before, and how it should be managed going forward.

Ultimately, the newly formed agency had the ambitious goals of completely rebuilding the VET system and ensuring a stronger connection to the demands of the labour market. The EU stood ready to support the agency's capacity-building in these areas, offering various forms of assistance. This included technical support where experts would advise decision-makers on successful VET practices within the EU, as well as field trips to Western European and Baltic countries for firsthand observation. Finally, the EU would back the agency through grant schemes designed to test new policy approaches and gather valuable lessons from trials within selected VET schools. While this support would undoubtedly bolster the agency team's political power and influence, it would also likely narrow their policy choices, favouring initiatives aligned with the EU's own approaches.

7.4.2 Soviet heritage and Europeanisation

To substantiate the proposed reforms, the Agency strategically framed VET as an obsolete residue of the Soviet era requiring comprehensive transformation. In response to potential opposition, the Agency asserted that all other educational sectors, from secondary to higher education, had successfully undergone modernization to align with contemporary global conditions. This argument emphasised the VET system's exceptional status as the sole remaining unreformed element within the national educational landscape. As indicated by *High ranked official in the VET Agency*:

In our country, secondary education is the education that most people are interested in. As you know, a new curriculum system has been introduced in secondary education, which is marked as a reform, with new textbooks, subjects, and so on. Similarly, in higher education, the Bologna system has

been adopted, which is also considered a reform. However, it is evident that vocational education, which existed in the Soviet system, continued at the same level until that time. Since reforms are being implemented at both levels of education, it is imperative to pay attention to vocational education as well.

Interestingly, scrapping the Soviet past and building a modern VET system was not associated with borrowing European identity or political and social culture. Both local decision-makers, EU officials, and experts indicated that the VET system should be modernised to meet the demands of the labour market. Both parties favoured the European models of VET development as a mechanism and tools to make this possible. However, international actors were cautious about calling the process policy lending because that would look like a hard transfer of policy tools. As indicated by *Former ETF representative*:

The idea of Europe is not to dictate that countries like Azerbaijan adopt their approach, although it may play a role.

Local decision-makers were calling it policy learning and indicating that the objective was not to make Azerbaijan a part of the EU family but rather to learn from the best experience and take advantage of the resources that are provided by the EU and build a national model of VET based on international best experience. Even though this experience mainly included the European model, the decision-makers included Azerbaijanism (Azerbaijani nationalism) notion in the Law of VET, which sparked debate among the MPs who claimed that VET is not the field of education that should be guided by nationalism or ideology. In other words, the nationalistic approach when retaining the selected policy was obvious from local decision-makers, and although the changes were rationalised by the need for modernisation, the local decision-makers were careful not to use European modernisation discourse as a legitimising the change. As indicated by MP during the hearing of the Law in the Parliament:

I want to begin by stating that during the first reading, some MPs did not consider it necessary to include a separate article on Azerbaijanism in the vocational education Law. Today, those who sit in Europe and slander our state, nation, and land have no sense of responsibility towards Azerbaijani values, neither in their upbringing nor their education. It is a result of such ignorance that these individuals who lack an understanding of themselves, their nation, and their responsibility towards their people act as hired servants of foreign powers and defame their country and people. I believe that such individuals are under the influence of ...foreign forces and do not represent their own nation. The people have made it clear during the pre-election campaign that they not only reject these individuals but also unequivocally despise them. This is why we will not remove a single word

or letter from the provisions related to Azerbaijanism in the "Law on Science," the "Law on Preschool Education," or the draft "Law on Vocational Education" (Parliament of Azerbaijan, 2018).

It is important to note that, unlike in Baltic states, as well as Ukraine and Georgia, after the "orange revolutions"¹⁶, European modernisation was considered a threat in the local policy context (Langbein & Wolczuk, 2012; Piros & Koops, 2020, p. 127). There were many political reasons, from human rights issues to the promotion of democracy by the West as a policy tool towards neighbourhood countries, that ignited this threat (Valiyev, 2016). So, although the European VET system was attractive to local regulators, the main argument in favour of this system was its delivery methodology, which was based mainly on learning outcomes and practical learning rather than theoretical studies. This was very attractive for local decision-makers because they preferred students to be engaged in practical work rather than "be enlightened" by European democracy and citizenship concepts.

For example, the VET roadmap that was developed by McKinsey and adopted by the presidential decree is highlighted below nuances:

Globalizing and integration with the world economy set new requirements before the country's population. In the first place, this should be accompanied by the adaptation of the population's education level to international standards, a correct understanding of democratic values and their use in everyday life and compliance with the "lifelong learning concept" to ensure sustainable competitiveness (Government of Azerbaijan, 2016b, p. 33).

From a short passage above, all the keywords such as "globalization", "world economy", "international standards", "democratic values", "lifelong learning", "sustainability", and "competitiveness" are all to be found in most of the Western and in particular EU approved documents and reports. Hence, the vision of the reform is justified and directed towards "international standards" that are dominated by "Western values". However, local actors did not seek Europeanisation when adopting the European VET model, but rather this model's technical aspect, such as more practical work orientation, as well as the opportunity to share the cost of the VET system's expenses with the employers, was attractive when retaining the policies what is obvious from the discussion in

¹⁶ Orange Revolutions refer to a series of popular uprisings, protests, and electoral movements that shook several post-Soviet countries in the early 2000s. The term is inspired by the orange colour adopted by opposition movements as a symbol of change and democratic aspirations.

the parliament. Hence, although the old Soviet system was considered negative not only economically and politically but also culturally, the European model, on the other hand, was attractive as an alternative only economically and technically. On the other hand, elites were not aiming to shift from Soviet to European as was the case in many Eastern European countries and in this case, political and cultural nuances of the education system of the West (Europe in this case) were considered unattractive or sometimes dangerous for nation-building.

7.4.3 Low Expectations

The significant factor that enabled policy entrepreneurs to retain the selected course for the VET system was the overall low expectations of this system in all layers of society. The underinvestment of the VET system affected its devastated situation, and on the eve of reform, the main narrative in society was that the situation could not be worse. In other words, the dreadful situation of the VET sector was both the biggest challenge and was also perceived as the biggest opportunity to bring positive change. The understanding among the decision-makers was that the situation was so bad that any new initiative would bring positive change to the system. This situation also provided the opportunity for MoE to gain political dividends in case of any positive change in the system.

During the development of The Strategic Roadmap for VET, agency representatives sought to highlight the dire state of the system, portraying a scene of disarray and ineffective management. This strategy had a dual purpose: to secure maximum funding from both governmental and donor organizations while simultaneously providing a potential justification for future failures by assigning blame to prior decision-makers. The situation proved beneficial for the newly appointed decision-makers who had supplanted the previous team. Notably, the SWOT analysis of the VET system included within the roadmap was not solely the product of McKinsey & Company (the primary consulting firm). Rather, the MoE provided numerical data and figures in response to McKinsey's proposal, thus influencing the final analysis (Government of Azerbaijan, 2016b, p. 10).

Paradoxically, on the one hand, the document was using Germany, Australia and the UK as a benchmark, and on the other hand, the threats, challenges and risks after each strategic vision indicated that would cause an obstacle to enabling any change in this situation. Interestingly, each strategic vision also included the financing mechanism for the implementation of the indicated actions. However,

the methods of calculation of these costs or any reference to budgeting schemes were not indicated in the document.

The inefficient state of the VET system presented an opportunity for both the Ministry of Education (MoE), which governed the system, and the Ministry of Labour (MOLSP), which was responsible for the training and retraining of unemployed people, minority groups, and individuals with special needs. The MOLSP supported the reform and chose the European Model of VET, which aimed to create a more liberal system and less centralised governance. As indicated by the *Labour Ministry representative*:

At the same time, the participation of interested parties and stakeholders is essential in this process. If we consider management, today's challenges are such that the administration, according to the hierarchy, is not bearing fruit. It would be better to grant freedom to vocational schools today. We see that the previous centralised administrative method is not effective in managing the current challenges. However, this process should be made as open and wide as possible, allowing complete freedom in certain matters.

However, on the opposite, although the MoE was the reform champion, it was not ready to construct the decentralised liberal market conditions for the VET system, even though this was encouraged in the European VET model. As indicated by the *Former VET Agency Manager*:

I would say that the Ministry of Education and the Ministry of Labour are the most important institutions working on vocational education. However, at times, we observe that they have different perspectives. The Ministry of Labour views the vocational education system from the perspective of employment, whereas the Ministry of Education focuses on the general protection of the education system. One could say that one is more flexible, and the other is more conservative. The Ministry of Education is more conservative, possibly because it issues state-model diplomas, whereas the Ministry of Labour seeks to prepare individuals for the job market in a shorter time frame.

The conservative nature of the MoE was also raised by the private sector. As indicated by the *Adult education provider*:

In my opinion, the implementation of public-private partnership models is crucial. The state should collaborate with the private sector in the interest of the private sector rather than the state alone. Currently, I observe that these models are established while considering only the interests of the state, which often leads to suboptimal outcomes.

The Ministry of Labour (MOLSP) capitalised on the perceived shortcomings of the VET system to advance its own initiative of establishing an independent chain of

VET centres outside the purview of the Ministry of Education. This already complex situation was further entangled by the MOLSP's control over the Azerbaijan Unemployment Insurance Fund and its ambition to utilise those resources to establish its own training centres for the unemployed. The MOLSP's rationale was direct: existing VET institutions failed to provide quality training aligned with labour market demands, while the need to train unemployed individuals remained pressing. This, they argued, necessitated the creation of MOLSP-owned VET centres. As indicated by a *Labour Ministry representative*:

At that time, we did not have vocational training centres under our control. The centres were first established in 2007, and we mainly contacted vocational schools to conduct the training. We continued this practice in the following years. As I mentioned, after the establishment of vocational training centres in Baku and Goychay (cities) under the United Nations Development Program in 2007, our efforts in this area became more substantial, as we had our own centres. Therefore, it was essential to ensure that these centres were functioning effectively.

Interestingly, to legitimise this idea, MOLSP used the UNPD consultants to come up with a vision and validation for this approach. The Ministry of Education, although opposed to this initiative, was not able to argue against the claim that the VET system does not meet the quality standards of the labour market. Interestingly, when the MoE used the same argument with the support of the donor and employer organisations and requested the government to enable funding from the Unemployment Insurance Fund to invest in the VET system and fund VET schools, MOLSP rejected this initiative, citing the regulation that funding can only be used for unemployed. As indicated by the *EU representative*:

Now, if we consider that there is an unemployment insurance fund, which is utilised significantly for employment, the education system could also benefit from this fund, and it could be used as a source. Despite the existence of competition and jealousy between the two institutions, they both represent the state. However, MOLSP training centres do not cover all regions, villages, and cities, and there is room for improvement in this regard.

The widespread lack of confidence in the VET system, held not only by public institutions but also by industry and employers, proved a significant factor in enabling policy entrepreneurs to maintain their chosen policy approaches. Public institutions exploited this opportunity for economic and political gain. Meanwhile, the private sector, distrustful of the system's capacity for genuine reform, viewed the initiative sceptically as merely another top-down scheme. Consequently, large

companies took advantage of the situation to establish their own informal training centres.

7.4.4 Governance culture

Interview data analysis revealed that the centralised political governance structure of Azerbaijan, a legacy of its Soviet past, significantly influenced the tools and mechanisms enshrined within the VET Law. Policymaking and governance in Azerbaijan are characterised by a highly centralised, government-driven system. Decision-making follows a top-down approach, lacking the tripartite agreements between trade unions, employer organizations, and the government that are commonplace in many Western European nations. Moreover, Azerbaijan's labour market is dominated by the government, which is the largest employer, with a private sector lacking organised unions or confederations. Compounded by the nation's socialist history and pervasive distrust of the public sector, these factors have hindered the private sector's capacity and foresight to participate strategically in skills development during the reform process. As indicated by *Employer representative*:

Even today, entrepreneurs have little or no trust in the vocational school. They do not believe that vocational school will produce an educated and skilled person.

This, however, was against the paradigm shift, which was indicated by both McKenzie-led VET Roadmaps and EU-led Technical assistance projects. As mentioned in the interview by the *ADB expert*:

Who is this sort of authority? Like, who sets the standards? It's industry, not government.

When the idea of involving trade unions and employer confederations in vocational education was put on the VET Roadmap and Technical Assistance projects, the government welcomed the idea because it made decision-makers believe that this involvement would be accompanied by cost-sharing of the VET system's skill development. However, as indicated in previous sections, employers initially did not trust the education system. Furthermore, the government-owned enterprises were the biggest employers in the economy, and these enterprises were mostly run not considering market mechanisms but based on priorities and objectives set by the government. Additionally, managers of the limited private sector lacked the capacity to predict future developments of their firms and strategically plan human resources in advance. The situation with small and medium enterprises was

even more worrisome because these enterprises had limited resources and were not organised in unions. In fact, there was a belief in the country that the real private sector consisted of small and medium enterprises, while big private firms had links to government officials. Such a labour market structure would make it complicated to plan and implement skills development in a systematic manner. Besides, the expectation from the private sector was for the government to lead the skills development and supply the labour market with skilled workers. As indicated by the *Employer's confederation representative*:

If we go too deep, the value of education in the discipline, psychology, mentality, strategic planning, or education is not just about education but also about quality. . . . But of course, our society still waits for a lot from the system. Therefore, the role of the government is prominent here. We're not yet at a level where people shape things themselves.

Some interviewees indicated that this system was a legacy of the Soviet Union. As indicated by the *Former VET Agency manager*:

We also use Soviet standards in the construction and financing of education. We haven't been able to get out of that (Soviet) system yet, and it's not really an issue of education governance. These were issues related to the government's governance culture.

In fact, decentralization of education, particularly vocational education, was pushed by multinational organizations, but in reality, none of the players in the labour market wanted to decentralise the system. The government wanted to keep its authority over the schools and assign roles and responsibilities based on its strategic vision and objectives. On the other hand, employers wanted a skilled workforce without committing anything in return. Schools also wanted no change in their activities. As indicated by *employers' confederation representative*:

I agree that people want everything ready. And that comes from our 70 years of history because he sits very deep. I don't yet know how many generations will be changed. There's a question of accountability, and my students start with Topic 1, which states that no one has been responsible for anything for 70 years. There was limited decision-making in our country, but everything came from Moscow. These few generations are a deeply shaped generation, a generation that raises young people today. What they were saying was he did the job of keeping his head down. He would not have the authority to make decisions and take responsibility.

The case of the capacity of the private sector and strategic visioning of the managers was also raised by the private sector representative. The interviewer indicated that the mechanisms of the market economy had not been properly functional. When the market economy is not functioning accordingly, the

“delegation of skills development to the private sector is not possible”. As indicated by the Private sector representative:

We don't think we had a business (based on the market economy) in a way that we're looking at overseas; they've been shaped (their business culture) for 100, 200 years, and we don't have it. At the same time, our past is in the Soviet Union. Therefore, the government must provide funds for a period of 15 to 20 years (for skills development). Why? Because It's about solving the skills gap issue here. After that, the responsibility can be slowly passed on to businesses and the private sector. Over time, the generation has to change, and the thought has to change. That is not the case now. Waiting for something from the business today to see what size they have in corporate social responsibility. Why didn't it exist? It will not be possible. We needed time, at least 30 years, for this to take shape in our country. Therefore, today's government must come forward, just in this area.

Thus, the analysis reveals that despite multinational organizations pushing for the decentralization of vocational education and the VET roadmap highlighting it as a path forward, the Ministry of Education was the primary opposition to the full delegation of responsibilities to employers and schools. The Ministry aimed to maintain a centralised governance structure and argued that both employers and VET schools lacked the capacity to implement a decentralised system. Additionally, due to the lack of organization in the private sector and employers, the demand for labour was not systematic and was fragmented, which was the main reason for the skills gap.

The Ministry's position on this matter was based on the belief that the government was better equipped to lead the skills development and supply the labour market with skilled workers, given the country's historical and cultural context, as well as the challenges posed by the fragmented nature of the labour market. The private sector lacked the necessary resources and organizational structure to engage in skills formation effectively, and it was not easy to plan and implement skills development systematically.

Moreover, as the biggest employers in the economy were government-owned enterprises, their priorities and objectives were set by the government, not market mechanisms. In this context, the role of employers in the governance and implementation of vocational education was deemed limited. Additionally, the managers of private sector firms lacked the capacity to predict future development and strategically plan human resources in advance. These factors

further complicated the planning and implementation of skills development in a systematic manner.

Overall, this section has delineated the scope of the EU's impact on VET policy. While the EU and other donors played a significant role in emphasizing the need for VET system reform and initiating policy change, the reform process did not begin in earnest until domestic stakeholders recognised its necessity. However, once conditions became conducive to policy change, internal actors wielded greater influence in determining the policy trajectory and selecting the specific mechanisms that would shape the new policy framework.

Despite continuity in policy, local actors were paramount in driving and adapting the chosen policy approach in accordance with domestic conditions and constraints. This observation aligns with the theoretical debate suggesting international organizations primarily influence the agenda-setting and initial policy selection phases. However, the retention phase is primarily shaped by local actors and their ideological orientations. Therefore, while the EU's influence was substantial during the reform's early stages, it diminished during the variation stage, as Verger suggests (Verger, 2016, p. 31).

In conclusion, the selection of mechanisms that would be included in the VET law was influenced by the combination of material and ideational factors. The major material factor was limited financial availability to the education sector, which was inherited as a measure from the World Bank and IMF. The major institutional factor was the delegation of the reform of the VET to the Ministry of Education, as well as assigning the role of the minister to a person with an economic background, which effected the paradigm shift in the education system. The limited financial availability shaped the ideational factor of policy transfer, and the EU offered support to design a model of VET where integration of employers to the VET is perceived as a decentralization of the VET system, as well as a cost-sharing model for the financing of the skills development. However, the centralised governance structure of the government and the unorganised private sector hindered the transfer of the EU model, which resulted in modifications in the Law of Vocational Education.

Furthermore, despite the push towards decentralization of vocational education, the Ministry of Education opposed the full delegation of responsibilities to employers and schools, citing the lack of capacity and fragmented nature of the

labour market. The Ministry's position was based on the belief that the government was better equipped to lead skills development and supply the labour market with skilled workers, given the challenges posed by the fragmented nature of the labour market and the historical and cultural context of the country. Hence, the government would rather utilise a state-regulated bureaucracy model for VET governance (Fawcett et al., 2014), unlike the EU's best practice advised (Maurer, 2012; Sperandio, 2015; Wolf, 2020; Langthaler et al., 2022; Tutlys et al., 2022). While the VET Law incorporated policy tools derived from the EU model, it crucially excluded the concept of decentralization. This omission fundamentally undermines the system's potential for effective implementation. Overall, Table 10 identifies the multifaceted elements that contributed to policy change, which are analysed through the lens of Verger's framework.

Table 10 Factors influencing policy change

| Influence Type | Variation | Selection | Retention |
|---------------------|---|--|---|
| Ideational (Global) | Problematization of Human Capital Issue | International best practice | Soviet past and Europeanisation |
| Ideational (Local) | Prevailing negative perceptions of the VET system | Paradigm shift | - Governance culture - Low expectations from society |
| Material (Global) | - World Bank reforms - Migrant workers | - Qualifications framework - Cost-sharing mechanism | |
| Material (Local) | - Skills shortage - Demographic change | Role of institutions | The impact of policy champion |

The following chapter expands upon the results of the data analysis, discusses the research findings and seeks to answer the research questions. It employs a conceptual framework to determine whether the findings support or refute existing theories that explain policy change.

CHAPTER 8: DISCUSSION

8.1 Introduction

The research employed a conceptual framework outlined in Chapter 5, which analysed the policy change process in Azerbaijan's VET system from multiple perspectives. This approach delved into the intricate dynamics between international organisations and nation-states, examining the impact of the EU on policy change within the country. This study aimed to find answers to research questions and address the empirical gaps indicated in Table 11, which is discussed in the Introduction chapter. Hence, this chapter critically analyses the findings to address the research questions within the academic debate. A synthesis of findings is offered, emphasizing how they illuminate the extent of EU influence on Azerbaijan's VET reform, the complex interplay of material and ideational drivers, and the specific mechanisms adopted or discarded through policy that are reflected in the academic literature. This analysis is situated within broader scholarly literature, examining how the research findings support, contradict, or necessitate refinement of existing conceptual perspectives.

Table 11 Research questions and empirical gaps

| Research questions |
|--|
| 1. <i>To what extent has the European Union influenced the VET reforms in Azerbaijan?</i> |
| 2. <i>What interplay of local and global factors, including material and ideational drivers, determined the trajectory of these reforms?</i> |
| 3. <i>What specific VET mechanisms were proposed for introduction in the Law on Vocational Education, which of these were ultimately integrated into or excluded from the policy, and what were the reasons for these decisions?</i> |
| Empirical gaps |
| 1. The extent of the international organizations' influence on the nation-state in education policy |
| 2. EU's Power to influence education policy in non-member states |
| 3. VET as an instrument for social policy |
| 4. Transfer of ideas to restructure the VET system in developing countries |
| 5. Transition and evolution of the VET system in post-socialist Eastern Europe |

Following the process-tracing case study approach, the discussion is structured to begin with the description of the outcomes and then trace back to the historical

factors that led to these outcomes. In essence, the discussion first addresses research question three regarding the mechanisms and tools that were either included in or excluded from the Law on VET. This is followed by an exploration of why and how these decisions were made, thereby answering research question two. Subsequently, by addressing two supporting research questions, the extent of the European Union's influence on the policy change process unfolds, which leads to the answer to the main research question of this study. Additionally, this chapter discusses how the findings of this study fill the empirical gaps identified in the literature review, further enriching the understanding of the topic.

8.2 What policy ideas were transferred and translated?

The findings confirm the existing scholarship on the prevalence of neoliberal and neoconservative policies in global VET reform. This research demonstrates how the emphasis on human capital investment (Schultz, 1961; Anopchenko et al., 2018; Zajda, 2018) and the push for VET alignment with labour market needs (Witt, 2018) shaped both the EU's approach and the framing of Azerbaijan's educational challenges. The focus on harmonization and standardization through the NQF, along with the integration of lifelong learning principles, aligns closely with the mobility and adaptability goals of the EU's broader economic agenda (Dale, 2005). The move away from traditional vocational training towards lifelong learning further reflects the pressures of economic restructuring that scholars like Field (2006) have documented.

The findings of the study reveal that the EU and other policy entrepreneurs were successful in 'selling the idea' of integrating employers into the VET system as a policy solution to address both the funding and skills gap issues of the system. The adopted European model envisaged a market-oriented, demand-focused, decentralised VET system with a heavy emphasis on work-based learning and the involvement of employers in decision-making related to the content, governance, and funding of the skills development system. Interestingly, the findings of this study indicate that although employers emphasised the skills gap issue and agreed that their involvement in the skills formation system is a way of enhancing the quality of training, they were not enthusiastic about funding the system where the government would remain in the leading role. On the opposite end of the spectrum, the Ministry of Education, which was granted the leading role in the management of the VET system, was not keen to decentralise the governance of the VET system and give more authority to VET schools and employers.

Intriguingly, the discrepancy between employers and the Ministry of Education was raised in the selection and mostly in the retention phase of the policy change. In fact, the text of the Law of Vocational Education changed several times, oscillating between a more centralised and decentralised system of VET governance. The main argument was not what policy should be in place but rather who would play a leading role in this policy. The EU, having been successful in the variation and selection of the policy, was not politically active in the retention phase because of its limited influence on the government. Ultimately, the adopted policy was not transferred as a program, as indicated by (Campbell, 2021), but rather transferred as an idea and translated into a centralised system of governance where the government would play a leading role.

Thus, the European model of VET, which is more market-driven and decentralised, made it to the policy agenda and the policy document (the Law on Vocational Education). However, it was altered to work in a centralised governance system based on a government-led skills development tradition (Maurer, 2012). The primary elements and instruments that would enable the market-led skills development system in Azerbaijan, including stimulating the private sector with certain cooperation mechanisms and giving more autonomy to govern the VET institutions, including involving employers in governance, were omitted from the final policy text. In fact, the government was willing to share the cost of the VET system but was not keen to change the governance or financing structure of the skills development system.

It is noteworthy that the implemented policy solutions ultimately deviated from addressing the core problems that initially triggered the VET reform. While the initial phase of policy variation (problem identification) accurately pinpointed the poor quality of the workforce in the labour market as a key concern, the subsequent selection phase prioritised a solution proposed by the EU technical assistance project: linking the VET system to the labour market through specific tools and mechanisms. However, during the crucial retention phase, the government rejected these proposed enablers, effectively severing the policy's connection to the fundamental issue it was intended to address. This disconnect between the final policy and the root cause it aimed to address, likely stemming from the significant modifications required to the political culture, represents a critical limitation within the reform process.

8.2.1 How were these ideas transferred?

As indicated in the literature review chapter, there is a growing consensus that most policy transfer mechanisms can be captured by distinguishing between learning, emulation, coercion, and competition (Gilardi and Wasserfallen 2019). The findings of this study revealed that although one can argue that all four mechanisms were in place at different times and phases of the policy process, learning and coercion were dominant mechanisms in the case of the EU and Azerbaijan relations in the VET sector. This study's findings align with the work of Gilardi and Wasserfallen (2019) and Dolowitz and Marsh (2000), emphasizing policy learning suggests a direct policy transfer mechanism between the EU and Azerbaijan, characterised by intentionality, explicitness, and the national policymakers' proactive role in the process. This study reveals the EU's strategic use of both soft and hard mechanisms to influence Azerbaijan's VET policy. Soft mechanisms included persuasion, normative pressure highlighting deficiencies in the existing VET system, policy recommendations, and capacity-building programs. These align with Busemeyer's (2012) analysis of how the EU fosters a competitive environment to encourage improvement toward international standards. However, in the selection phase, alongside soft mechanisms, hard mechanisms were also employed. Technical assistance projects and benchmarking through the Torino process, directly tied to policy outcomes, offered clear incentives for aligning with EU expectations (Shipan & Volden, 2008; Heimo & Syväterä, 2022; Edwards et al., 2023).

As indicated in the Findings chapter, the policymakers in Azerbaijan were attracted to the success of the policy change in the case of the Baltic States, which drew their interest in learning or lesson-drawing from the EU. Given the similar inheritance of the Soviet system, the local actors accepted the EU model as the best practice because of its experience in this region. Nevertheless, most policymakers interviewed for the study noted that they scanned the international environment in search of effective policies, assessed these policies through a thorough cost-benefit analysis, and chose the most optimal policy for their country (Weyland, 2005). While interviews with policymakers emphasise a cost-benefit approach to policy selection, aligning with the methodological individualism and utility maximization focus within rational choice theory (Risse, 2000; Weyland, 2005; Verger, 2016), this study's findings suggest a more complex picture. Policymaker narratives of "scanning" for proven global solutions suggest a rational

process. However, evidence indicates additional factors beyond purely rational choice influenced the embrace of EU-supported mechanisms. The findings support the claim of Simmons & Elkins (2004) and Shipan & Volden (2008) that local actors conducted the learning process quite superficially without examining the causal connections between a given policy and its outcome elsewhere. In other words, the local actors were attracted to the idea of integrating employers into the VET system but did not examine the structural changes that would be required to implement the policy in order to make the system effective for skills development. This highlights that while elements of rational choice may be present, they do not fully account for the motivations behind policy adoption.

Additionally, as indicated in the Findings chapter, the EU has played the role of a knowledge hub during the process. As noted by Zapp(2021), “the focus on coercive instruments and soft norms obscures the fact that more is at work” and argues “that IOs not only exert pressure and diffuse norms, but they also increasingly provide the most authoritative and policy-relevant knowledge in education” (2021, p. 1024). Thus, the findings of this study support the idea that the EU’s role as a knowledge monopoly has a significant impact on policy formulation in the case of VET policy change. So, although there was no direct coercion between Azerbaijan and the EU as in the case of the Baltic states when they signed conditionality agreements, the EU’s possession, as well as supply of policy-relevant knowledge, was extremely effective in the case of Azerbaijan. Thus, although the EU did not coerce Azerbaijan to choose certain policies, “the menu of choice” was limited and designed based on the knowledge and expertise of the actors enforced by the EU. In other words, “the potential of supranational EU institutions for coercive transfer” (Bulmer & Padgett 2005, p. 104) is neglected, considering that the European reform ideas represented derive from former national or regional reform ideas, many of which have their origin in Western Europe.

Furthermore, considering the EU organizations' articulation of the poor state of the VET development in Azerbaijan in the variation phase of policy change, many indicators and benchmarks used for the reports were often designed to assess the Western European VET systems. Overall, even if the interviewees representing the EU and its institutions did emphasise that the EU as an institution does not have authority to influence even its member states, this study supports the literature that there was more than policy learning taking place during the process and the

EU, being aware of the lack of social dialogue and stakeholder capacities, pushed for the policy mechanisms that were aligned with its vision but significantly different from the realities of the political-economic structure of Azerbaijan (West, 2013).

8.2.2 Why were these policies transferred?

Speaking about the motivation of policymakers to transfer policies from the EU, theoretically, Azerbaijan would be willing to borrow policies of the EU because it is eager to be part of the European Union both politically and culturally (Drezner, 2001; Ramirez et al., 2016). However, the findings of this study identified that not only Azerbaijan does not want to be part of the EU politically and culturally, but it has also, in many cases, excluded itself from Europe culturally by emphasizing national identity and aiming to stay unique and play a role of the bridge between East and West by encompassing cultural traits from both regions. Hence, looking at the case from a neo-institutionalist lens, assuming that Azerbaijan is prepared to borrow policies from the EU because of political and cultural reasons does not explain the policy borrowing in the case of vocational education and training (Li & Pilz, 2021).

On the other hand, by focusing on economic factors, the assumption would be that Azerbaijan's economic priorities would facilitate policy borrowing in the field of VET. The globally structured political economy theory explains the phenomena by looking at globalization and the spread of neoliberal policies and its effect on national education policies (Dale, 2000; Sung et al., 2000; Rizvi & Lingard, 2010). However, the discrepancy between Azerbaijan's economic model, which is based on state capitalism and a rentier economy that is highly dependent on resource exports, does contradict the EU's preference for a liberal market economy where the private sector plays a leading role. So, although the bilateral agreements between the EU and Azerbaijan indicate the transition of the latter to a market economy and support of the former in this process, Azerbaijan's rejection of signing the association agreement with the EU indicates that it does not seek any economic harmonization with the EU. Therefore, economic globalization does not fully explain the policy transfer phenomena between Azerbaijan and the EU.

Nevertheless, the findings of this study based on a historical institutionalist perspective (Mundy et al., 2016) indicate that local decision-makers were mainly attracted to the European VET model because of its utility function and the so-

called promise to integrate employers into the vocational education system. The integration of employers into VET was not only aimed at closing the skills gap, as many reports by both international organizations and local experts highlighted as a main problem in the VET system of Azerbaijan. The hidden motive of integrating employers was sharing the burden of financing the VET system. In fact, rebuilding the collapsed VET infrastructure required millions of euros, and the unavailability of the EU structural funds, as was the case with the Visegrád and Baltic states before and after they gained EU membership, made it almost impossible for the state to finance the restructuring.

The dominant discourse emphasised a shift in responsibility, positioning employers as key stakeholders in the skills formation process and departing from a reliance on state-centric provision models. The slogan of integrating employers into the VET system was merely aimed at building a system where employers take part in skills formation by partly financing the system. Hence, the findings of this study suggest that the motivation of policymakers to transfer policies from the EU in the case of vocational education and training was not primarily political or cultural but rather partly economic with pragmatic motivation. The local decision-makers were attracted to the European VET model because of its utility function and the so-called promise to integrate employers into the vocational education system. The hidden motive of integrating employers was sharing the burden of financing the VET system.

Nevertheless, despite the initial focus on integrating employers into the VET system, the government ultimately retreated from this approach upon recognizing the lack of preparedness among employers, both in the public and private sectors. This lack of preparedness manifested in an unwillingness to not only financially support the VET system but also to actively participate in its management. While the rhetoric of employer integration remained, it failed to translate into concrete action. The crucial mechanism of decentralizing VET governance, which was essential for enabling employer participation, was ultimately not implemented.

8.3 The extent of the EU's involvement

As indicated in the context chapter of this study, the vision of the Azerbaijani government towards economic progress was not in line with the EU's concept of modernization. In other words, the government was seeking to keep the centralised system of governance, did not intend to build its economic system on

a liberal market economy by delegating most of its functions to the private sector, and would rather build its economic system on a state capitalist model similar to Russia or China, where the main economic activity had been around state-owned enterprises. In addition to this, although the government had been aiming to diversify the economy, its main source of state income derived from the extraction and export of resources. In fact, most of the resource exports were to the European Union, making the EU the largest economic partner of Azerbaijan.

From the picture described above, it is obvious that, at first glance, the EU's and Azerbaijan's visions diverge in almost all spheres of cooperation. Having security as the main priority towards the region, the EU's cooperation with Azerbaijan was heavily dictated by the energy security of its member states. On the other hand, Azerbaijan's main priority was mainly economic in nature, by exporting its natural resources to the EU member states. Interestingly, the aim of the government of Azerbaijan was to build bilateral relationships with different members of the union rather than to build binding cooperation with the European Union. Needless to say, the government of Azerbaijan cannot afford to ignore the institutional power and capacity of the EU but shift its cooperation focus from the union to the member states depending on the political or economic agenda in the EU, Azerbaijan, or any of the member states.

However, both the EU and Azerbaijan, in order to keep their strategic cooperation priority functional, also collaborate in many other sectors, from education to health and labour policy. Nevertheless, being aware of the divergence in political and economic vision, until the war sparked in Ukraine, the EU had not developed a different strategy towards each state in the Eastern Partnership region, and specifically in the education and training sector, utilised the same strategy that was used in the Visegrád and Baltic states before they got EU membership (Tutlys et al., 2022). Hence, the EU has utilised similar material and ideational channels to achieve its policy objectives in Azerbaijan.

When looking at the case from a historical institutionalist perspective, the findings of this study indicate that, as in many other post-socialist republics, the critical juncture was the collapse of the Soviet Union, which caused much turbulence in both the social-economic and political spheres in the Eastern European region (Tutlys et al., 2022). However, unlike in the Eastern European case, the two other critical junctures, namely the transition to a liberal market economy and

membership in the European Union, did not take place in Azerbaijan. Consequently, the conditionality of political and economic reforms mentioned previously was not on the agenda of EU-Azerbaijan policy transfer.

In terms of material channels, the EU has employed technical assistance and grant projects with the specific aim of integrating Azerbaijan's VET system into the European VET space (West, 2013, 2014). Through this approach, the EU has provided funding and technical expertise to support the modernization and reform of Azerbaijan's VET system by focusing on policy and legal acts and omitting any significant infrastructure improvement. This has included the development of a new competency-based curriculum framework, teacher training programs and materials, and the establishment of a new legal framework for the VET sector governance.

This study does not posit that the European Union, at the central level, actively pursued the harmonization of Azerbaijan's VET system with its own. The primary actors driving the reform process from the European side were the ETF and consultants hired by EU-funded projects to implement the ETF's vision. While acknowledging the ETF's affiliation with the EU, it is important to recognise that it possesses distinct institutional and corporate interests that may not fully align with those of the EU itself (McCoshan, 2017). Furthermore, the ETF, along with other EU institutions involved in shaping education policy, is undoubtedly influenced by broader narratives formulated by organizations like the OECD (Mundy, 1998). Consequently, it would be unrealistic to anticipate that any recommendations made by the ETF during the policy reform process would significantly deviate from the EU's overall trajectory in the realm of VET.

On the other hand, the EU has also employed soft mechanisms to influence policy change in Azerbaijan's VET system (Robertson & Dale, 2008). Azerbaijan has been exposed to EU best practices through field trips organised to EU countries, seminars, meetings, and conferences organised by the European Training Foundation (ETF). The dissemination of EU best practices has been targeted at all actors in the decision-making process, from policymakers to teachers, school managers, local entrepreneurs, experts, and consultants. This approach has aimed to change the perceptions and attitudes of key actors in the VET system, thereby fostering the adoption of EU practices and policies (Ante, 2016b).

Overall, the EU's involvement in the policy change process was extensive. Considering the EU's funding of technical assistance projects, the ETF's almost consistent and extensive work with policymakers during the new policy development stage, as well as the identification of the EU model of VET development as the main strategic direction by both the consulting companies hired by the government and the Ministry of Education, this involvement can be well documented. Nevertheless, this study does not assume that the government of Azerbaijan did not explore other models of VET development or did not consult with other donor organizations or other states. However, since the focus of the research was the identification of the EU's role in the process, as well as the outcome of policy change in the frame of the EU's VET vision, it does not cover other players' involvement in the process.

As indicated in the methodology chapter, since the case study was not focused on comparative analyses of two similar entities (nation-states), any attempt to identify divergence and convergence as a result of policy change would be limited. In purely technical terms, this study identified that most of the policy mechanisms (implementation of the National Qualifications Framework, development of competence-based qualifications and curricula, recognition of prior learning, etc.) proposed by the EU were adopted in legislative acts of Azerbaijan. However, convergence cannot be reduced to the formal adoption of specific policies and policy instruments, and the formal adoption of a policy is not synonymous with this policy being properly in place (Verger & Fontdevila, 2023). Instead of a narrow understanding of convergence, by looking at Hay's different types of convergence (see Table 6, p.90), deconstructing the convergence into a multi-dimensional perspective (Verger & Fontdevila, 2023) and exploring it based on scenarios, this study reveals that *the same policy paradigm, but different instrumentations*, as well as *similar instruments, but different legitimator rhetorics and processes*, are scenarios that are applicable for this case study (Hay, 2004a).

Thus, as indicated in this study, the policy paradigm of *integrating employers into the VET system* was both official discourse in the EU and in Azerbaijan during the policy change process. However, the instruments used to enable the policy were different. In fact, the enabling factor for the policy was a decentralised system of VET according to the EU agenda; however, although policymakers borrowed the paradigm, they used different instruments that were more functional in the centralised governance system. Additionally, in Azerbaijan, there were instances

where the convergence of tools, such as the incorporation of work-based education into the VET framework, was highlighted. However, the apprenticeship method that facilitates methodical skill enhancement was not given much consideration. Instead, a short-term internship was deemed adequate for delivering work-based learning, as evidenced by this case study.

Hence, although the policymakers transferred the discourses, rhetoric, and paradigm during the policy change, and even today, the official narrative converges with the language of the EU that the VET should be as close to the industry as possible, the process and instrument significantly diverge; hence, the government does not utilise the same mechanisms enabling the involvement of employers to the governance of the VET system. This situation also supports Portnoi's statement that political manoeuvres might lead governments to adopt policies without the intention of implementing them. In this case, policies that serve a strategic purpose, such as political expediency, are symbolic policies that are typically abstract and lack concrete language for implementation (2016, p. 124).

8.4 Addressing the literature gaps

The research findings of this case study support the idea that policy transfer is possible even when the international organization does not exercise any obligatory pressure on the country or when the cultural, economic and political architecture of the borrower country diverges from the IO's ideological inclination. Furthermore, external pressure is not enough to converge in VET policy, and it is interpreted differently by policymakers. This can lead to different responses in each political and social context depending on the priorities of local actors (Valiente, Sepúlveda, et al., 2020, p. 12). This is because the education sector creates its own demand independent from economic reality, most of the time triggered by social demand.

This study demonstrated that social demand is a crucial factor in the borrowing and shaping of policies, with the phases of reception and translation being more decisive in determining the trajectory of the borrowed policies (Steiner-Khamsi, 2021). A nation's unique political structure and institutional capabilities significantly shape how global policy influences are translated into practice. While international actors like the EU serve as hubs of knowledge and promote specific policy models, the implementation of these programs within a local context

inevitably leads to modifications that reflect the specific realities of the country. In addition, path dependency makes it very difficult to change dramatically even when the policies are adopted. This may lead to EU instruments such as the European Qualifications Framework and the European Credit System for Vocational Education and Training being implemented in line with national training systems rather than transforming them. This supports the idea that when the borrowed policy does not match the cultural, political, or economic structure of the borrower country, it remains a symbolic policy and policy convergence is mostly discursive.

This research contributes to the ongoing debate on VET's role in developing countries (Kingombe, 2012; Sperandio, 2015; Witt, 2018; Wolf, 2020; Melnyk, 2023). While economic development is a primary goal, the findings in Azerbaijan suggest a more complex interplay of motivations. The VET reform, while justified by economic modernization discourse, also appears driven by a legacy of using education for social management. This echoes Soviet-era practices of channelling youth into the system, regardless of skill demand, to maintain order. The findings highlight a potential form of isomorphic mimicry, where Azerbaijan adopts the outward form of Western VET models while underlying functions remain rooted in historical practices. This case questions the assumption that VET solely serves labour market needs and reveals an understudied gap in the literature: within developing countries, VET may function as a tool of social policy and a reflection of path dependencies shaped by prior systems.

Additionally, the literature on the topic often focuses on and emphasises the influence of neoliberal policies on education systems worldwide, including decentralization, privatization, outcome-based management, and increased market competition (Bonal, 2003; Rizvi, 2007; Rutkowski, 2007). The Azerbaijani case, however, presents a counterpoint to this dominant narrative. Despite embracing the rhetoric of neoliberal reform, the findings indicate a strong resistance to its core mechanisms in practice. The government maintained centralised control, explicitly prohibited privatization of public VET institutions, and, while expressing a desire for labour market alignment, failed to include policies incentivizing stakeholder cooperation. This paradox suggests a strong path dependence in Azerbaijan's governance structures, creating resistance to market mechanisms despite the appeal of the neoliberal discourse. This case study challenges the assumption of a unidirectional global influence of neoliberalism,

highlighting the complex interplay between external pressures, ideology, and the enduring legacies of pre-existing socioeconomic systems.

Moreover, the case study suggests a strategic use of neoliberal rhetoric, possibly motivated by a desire to signal modernity to external actors while preserving domestic control structures. This aligns with the concept of a Globally Structured Agenda for Education (Dale, 2000), where global norms and discourses shape national policy decisions. Azerbaijan may be selectively adopting the language of market-oriented reforms to gain legitimacy and potential benefits from international organizations, aligning with the notion of a Global Education Policy (Robertson, 2012; Green, 2016; Verger, Novelli, et al., 2018). However, this adoption appears largely performative (Steiner-Khamsi, 2014, 2018). The resistance to decentralization, the prohibition of privatization, and the lack of genuine labour market integration mechanisms indicate a form of isomorphic mimicry. The government superficially adopts the outward form of neoliberal VET models to meet external expectations while underlying structures and power dynamics remain largely unchanged.

Furthermore, this case study underscores the complex relationship between ideas and institutions in shaping VET policy change. The influence of global discourses promoting neoliberal reforms and human capital development proved significant in framing the problems Azerbaijan's VET system faced, shaping the perceived need for change. However, these external ideas interacted with deeply embedded institutional legacies of the Soviet era, characterised by centralised control and a focus on social management through education. This path dependence limited the full adoption of market mechanisms despite the attractiveness of neoliberal rhetoric. As indicated in this study, the EU's, as in the case of other multilateral organizations' preference for the ideational driver for policy change is effective in framing the issues and guiding the discourse and narratives (Bonal, 2003; Verger, 2012). However, the EU's limited influence on institutions confines the realization of ideas into practice. Thus, this study illustrates that while ideas can instigate reform and guide its direction, pre-existing institutional structures ultimately constrain the extent and nature of change in profound ways (Ebbinghaus, 2009).

Overall, this study's findings highlight the continued complexity and unpredictable nature of post-socialist transformations, even decades after the Soviet collapse. This echoes Silova's (2010) critique of simplistic narratives about a triumphant

linear progression towards Western models. The Azerbaijani case reveals the limitations of a 'one-size-fits-all' approach to reform promoted by the EU. By mirroring policy transfer strategies used in Central Europe, without sufficient adaptation to Azerbaijan's unique context, the EU displayed a limited understanding of the region's institutional dynamics. This lack of nuance risks fuelling perceptions of post-socialist spaces as inherently deficient, trapped in a perpetual "crisis" narrative as described by scholars (Moga & Alexeev, 2013). The case study underscores the importance of moving beyond self-orientalising discourses within both post-socialist countries and the institutions seeking to assist in their reforms. Recognizing the persistence of historical legacies and the potential for divergent paths is crucial for promoting truly effective and contextually appropriate policy change within the post-socialist space.

8.5 Conclusion

In conclusion, the findings of this study suggest that the translation of the transferred policy was a complex process that was influenced by a variety of factors, including the interests of different stakeholders, the political context, and the availability of resources. The final policy outcome was a hybrid system that incorporated elements of both the European model and the traditional Azerbaijani government-led system (see Figure 1, p. 11). The findings of this chapter indicate that the EU played a significant role in both problematization and the selection of appropriate policy solutions in Azerbaijan's VET system. Specifically, the EU advised the government through the European Training Foundation on the problematization of the human capital issue and proposed a VET development model that could be identified as a European model of VET development. In addition, the EU funded a technical assistance project to advise and support the development of the Law on Vocational Education. Analysis within this chapter reveals that local decision-makers were primarily motivated by the European VET model's focus on enhancing employer engagement within the education system. This emphasises the driving factor behind the attraction to the model. In other words, the European model envisaged a decentralised VET system with a heavy emphasis on the work-based learning involvement of employers in decision-making related to the content, governance, and funding of the skills development system. Given the limited financial support for the VET system, decision-makers aimed to involve employers in both content development and funding the skills development system. However, the government was not keen to

decentralise the governance of the VET system and give more authority to VET schools and employers. This was primarily due to the limited capacity of the unorganised private sector and underfunded VET schools. Thus, the European model of VET, which is more enterprise-led or social partnership-led and decentralised, made it to the policy agenda and the policy document (the Law on Vocational Education). However, it had to work within a centralised governance system based on a government-led skills development tradition. The primary elements that would enable the enterprise-led or social partnership-led skills development system in Azerbaijan, including stimulating the private sector with certain cooperation mechanisms and giving more autonomy to govern the VET institutions, including involving employers in governance, were omitted from the new policy. In fact, the government was willing to share the cost of the VET system but not willing to change the governance or financing structure of the skills development.

Overall, the Soviet and Socialist past of the country, which had deep sociological roots, as well as the capacity of all local decision-makers, affected the policy change process. The aim to modernise the skills development system to make it responsive to the needs of the labour market was hindered by the unstructured labour market players and the government's unwillingness to make dramatic changes in the governance system. The findings of this research showed that Azerbaijan borrowed EU practices in the VET to tackle domestic challenges. As indicated by *Former ETF representative*:

So, of course, there was policy borrowing, and of course, there was no policy lending, I think. But in Europe, we are actually weak at that point. I think because we actually do have the solution that we had at the European level, they are more or less negotiated, and they're consistent or specific. It's very clear in the Treaty of the European Union that the Commission cannot tell countries how to run their education system. That's their own. But they had developed tools there. They had developed benchmarks to move systems forward. That is useful because it gives you a way to find your own solutions.

While the EU charter stipulates non-interference in education policy, it remains unclear whether this applies solely to member states or extends to neighbouring countries. While the EU might exert greater influence on non-member countries seeking membership, particularly those with less developed institutions, compared to its founding members with established systems, the true extent of this influence is a matter of ongoing debate.

Although the interviewee indicated that the relationship in the VET sector between Azerbaijan and the EU during the policy change process was not any policy lending and the EU did not put a condition to change the VET system to a certain way, “the menu of the solutions” that was offered to change the VET and find the solutions were limited. As indicated by *EU expert*:

The fundamental problem that I see, promoted by the EU, European training foundations, and others, is that this idea of what we call the demand side of human capital is very much the same. Very much keeping such countries as Georgia, Armenia, Azerbaijan, whatever, stuck in what I call a low human capital level... demand LED has failed all of these countries in the Balkans, in the Caucasus and many countries. Because they do not take care of what we call the supply side of human capital, and that's the fundamental difference between Ireland's approach to human capital and the rest of the world, for example... It's a big policy shift for shift forward thinking for the European Training Foundation because they're always talking about the demand side and labour mismatch. That is important, but it does not address the fundamental differences in human capital. Azerbaijan will exactly be the same if it continues to think about human capital. In terms of the demand side, it will never diversify away from its present structure of the economy and dependence on oil and gas unless it pushes harder to promote human capital from lower middle to high.

In fact, Azerbaijan was free to choose its own VET model. Still, the EU did not offer or advise any model where the government would lead the skills development system, which, as indicated by many interviewees, was crucial at that stage of the economic and social development of the country. The quote above highlights how international organizations prioritise a “demand-led” approach to developing human capital in line with their ideological and economic goals of promoting capitalism. However, this narrow perspective fails to consider the intricate socio-economic factors that influence the production of human capital. On the contrary, concentrating on a supply-led skills development system, with strong state intervention and resource allocation, could prove to be a successful strategy for cultivating human capital in the long run. Nevertheless, this approach is frequently met with opposition from both Western governments and international organizations due to its resource-intensive nature and heavy reliance on government involvement.

CHAPTER 9: CONCLUSION AND IMPLICATIONS

9.1. Overview

This thesis examined the complex dynamics shaping Azerbaijan's adoption of EU-supported VET reforms. The study revealed that while the influence of global policy trends and the aspiration for alignment with European models were significant drivers, the policy transfer process was heavily mediated by historical legacies, local institutional capacities, and the need to balance external pressures with domestic priorities.

The Azerbaijani case study underscores the importance of contextual nuance within theories of policy transfer. While the World Culture, as well as Political Economy perspective, illuminates the role of global norms and aspirations in VET modernization efforts in some cases, this study demonstrates its limitations in fully accounting for the persistent influence of path dependencies and the strategic agency of local actors in shaping reform outcomes. These findings suggest the need for theoretical models that better incorporate the complexities of policy change within post-Soviet contexts.

For countries seeking to enhance their VET systems in a globalised world, the Azerbaijani experience offers a cautionary tale. Successful and sustainable VET reform cannot be achieved through the mere imitation of international models. This study highlights the crucial importance of understanding historical trajectories, assessing local capacities, and carefully negotiating the balance of power between external influences and national priorities in order to design policies that truly serve the needs of the country and its citizens.

This study contributes to the broader field of education policy and transfer by providing empirical evidence on the mechanisms of policy transfer, including the roles of coercion, emulation, and learning that shape the final outcome. It challenges existing theories by highlighting the contextual factors that facilitate or hinder the successful adoption of international educational policies, offering a deeper understanding of the dynamics at play in post-Soviet educational reforms. By bridging the gap between international educational narratives and local institutional realities, this research enriches the discourse on educational policy and reform, signalling pathways for future inquiry that will continue to unravel the complexities of aligning educational systems with global trends and local imperatives.

9.2. Implications

9.2.1 Implications for theory

The detailed exploration of the EU's influence on Azerbaijan's VET system not only sheds light on specific mechanisms of policy transfer but also enriches theoretical discussions on the intricate dynamics between global education policies and local institutional practices. This research contributes to the fields of policy transfer and VET policy in the EU neighbourhood (Bennett, 1991; Dolowitz & Marsh, 2000), illustrating the complexity of adapting and implementing international educational reforms within a national context. By adopting the cultural, political economy approach, it rejects both neo-institutionalist and functionalist approaches to investigating the policy change process (Sum & Jessop, 2013). Hence, this study neither approaches the case evaluating it as a right or wrong choice as in the case of Parson's structural functionalism that solely focuses on domestic actors and events (Parsons, 2017; Silova et al., 2020). It neither took a neo-institutional approach to explain the policy change utilizing solely World Culture theory or World Systems Theory with a focus on external players that dominate the agenda setting and policy framing in the globalised world that we live in today (Carney et al., 2012). It, however, investigates all these grand theories to understand what happened, how it happened, and why it happened by exploring these theories to find the answer to the research questions.

Moreover, the application of critical realism, as well as the methodological utilization of reflexive thematic analysis, offers a deeper understanding of the generative mechanisms underpinning educational reforms (Bhaskar, 1975; Archer, 2007). By focusing on the specific historical, cultural, and political contexts, the study exemplifies how local conditions mediate the adoption of EU policies, thus contributing to a more nuanced approach to educational reform that values contextual sensitivity over universal application. This approach illuminates the complex interplay between global forces and local educational practices, challenging the dominance of economic determinism by highlighting the role of culture and politics in shaping educational policies. It supports the notion that VET reform is a multifaceted process influenced by a confluence of factors beyond mere economic considerations.

Overall, a comprehensive investigation into the dynamics of VET policy change, facilitated by the interplay of international influences and local contexts, underscores the necessity to understand the multifaceted nature of educational

reform, advocating for a theoretical and methodological approach that allows for a comprehensive investigation of policy change. Cultural Political Economy at this stage is a practical tool for investigating the multilayered process of policy change; however, it isn't a theoretical framework. It is perfectly suitable for case studies, but when it comes to the generalizability of outcomes and the implications of these case studies for building a theory, they fall short of conceptualization.

9.2.2 Implications for practice

This study underscores the inherent complexity of VET policy transfer due to the system's interconnectedness with the labour market, which is shaped by unique political, economic, and cultural factors. Unlike studies focusing on specific policy mechanisms (Jakobi, 2009; Pilz, 2016), this research highlights the transfer of overarching ideas driving reform. The findings reveal a limited capacity among local decision-makers to critically adapt these ideas and consider the broader context in which VET functions. This aligns with work emphasizing the importance of context-sensitivity in policy transfer (Steiner-Khamsi, 2012; Steiner-Khamsi, 2014). Both internal and external actors exhibited a 'fix' mentality, failing to address the interconnectedness of VET with larger education systems, evolving skill needs, labour market dynamics, and societal preferences. This "shortsightedness" risks undermining the success of reform efforts in any sector, a concern echoed by scholars critical of overly technocratic approaches (Robertson & Dale, 2015; Verger, Novelli, et al., 2018).

This study challenges the assumption that VET policy transfer is primarily a matter of identifying and replicating "best practices." Instead, it emphasises the importance of systemic analysis and context-specific adaptation. These findings point to the need for theoretical frameworks that illuminate the dynamic interplay between VET and its broader context (Esmond et al., 2023). Local decision-makers may benefit from such frameworks to move beyond a narrow focus on technical solutions. Further research is needed to explore how these frameworks can be incorporated into capacity-building initiatives. This would enhance policymakers' ability to critically evaluate transferred ideas, anticipate unintended consequences, and design reforms with a greater likelihood of successful integration within complex local realities, addressing a major gap in current policy transfer practice (Andrews et al., 2017; Piros & Koops, 2020).

9.3 Limitations and Future Research Directions

9.3.1 *Limitations of the Research*

The methodological limitations identified at this stage are related to the research strategy and data collection method. Regarding the use of case studies as a research approach, it can be stated that while their main strength is the ability to explore the issue in depth, the main drawback of case studies is their replicability, representativeness, or generalizability (Wellington, 2015). While all research methods must demonstrate rigour, including dependability and validity, the nature of case studies presents specific considerations. Given the uniqueness of each case and the multiplicity of perspectives involved, replicating findings across case studies within a strictly positivist framework can be problematic. Consequently, case studies often align with interpretive research traditions, seeking to illuminate a phenomenon through the nuanced understanding of participants' experiences.

Additionally, the study's emphasis on contextualisation, while providing rich detail, may limit the direct generalisability of findings. It is essential to interpret insights in light of the specific circumstances explored. While interviews illuminate actors' motivations and the factors shaping their decisions, they inevitably reflect a degree of subjectivity inherent in both the interviewee's and researcher's perspectives. This research, however, deliberately employs a case study approach for its analytical potential. The focus lies in generating in-depth insights into the specific context rather than aiming for broad generalisability.

Furthermore, qualitative research is sometimes contrasted against quantitative research due to its inability to generalise findings to broader groups (Hesse-Biber, 2017). Although the generally small, nonrepresentative samples typical of qualitative research do not allow for statistical generalisation, qualitative research aims for another type of generalizability known as analytic generalizability, which is comparable in power but different in goal from quantitative research's generalizability (Hesse-Biber, 2017).

Overall, qualitative approaches inherently carry limitations, as the researcher's personal values inevitably influence aspects such as research focus, framing, methodology, data collection, analysis, and reporting of findings. In this research, rather than viewing positionality as a weakness, it was embraced as a methodological strength. Reflexive thematic analysis was utilised to critically examine potential biases. Nonetheless, a rigorous two-stage data collection

process and a focus on empirical evidence further mitigated limitations, facilitating well-grounded conclusions and a thorough explanation of key findings.

Furthermore, focusing primarily on Azerbaijan may limit the generalizability of the findings to other post-Soviet states or regions with distinct socio-political contexts, thereby narrowing the breadth of application of the conclusions drawn. The specificity of examining the EU's influence while providing depth might overlook the impact of other international actors or internal dynamics that significantly shape Azerbaijan's educational landscape. This focus potentially underrepresents the multifaceted nature of influences on the VET system.

Additionally, it should be acknowledged that the study faced constraints related to the collection and analysis of data. Limited access to primary sources, such as official EU documents or direct interviews with key policymakers, impacted the depth and breadth of the analysis. Reliance on secondary sources introduces the possibility of biases, as these sources are shaped by the perspectives and interests of their authors. Although this study derived its findings from interviews with stakeholders and used internal documents, this might not be the case for other research because access to data in developing countries most of the time depends on the personal connections and knowledge of the key people in the process.

In addition, the selection between qualitative and quantitative research methods impacts the data gathered and the conclusions that can be drawn. Each approach has its own advantages and disadvantages in terms of representativeness, depth of comprehension, and ability to establish causation. For this particular study, a qualitative methodology was employed, but a mixed-methods approach could also be utilised for data analysis. However, due to the lack of statistical information and the recent timeframe of policy change, evaluating the effectiveness of the policy is currently challenging. Future research could build upon this work by employing a mixed-methods approach to assess the impact of policy change.

Theoretically, this thesis adopts a multi-conceptual framework to analyse VET policy reform in Azerbaijan, acknowledging the complex interplay between global pressures, local agency, material constraints, and ideational shifts. However, it is essential to recognise that the real-world dynamics of policy transfer are inherently complicated and may defy neat categorization within any single framework. While the study's findings highlight the explanatory power of certain theories, additional factors or unforeseen interactions between variables could

have influenced outcomes in ways that the framework does not fully predict. This limitation points to the value of ongoing theoretical refinement and suggests that future researchers may benefit from incorporating even more diverse perspectives.

Moreover, the study's primary focus on the policy adoption stage provides valuable insights into the motivations and decision-making processes underpinning Azerbaijan's embrace of EU-influenced VET models. However, this focus may limit a holistic understanding of the complete policy cycle. Implementation challenges, subsequent policy revisions, and the long-term consequences of the reforms lie largely outside the scope of this thesis. The study acknowledges that the choice to prioritise depth in understanding policy adoption necessitates the possibility for future research focused explicitly on other phases of policy change.

Finally, the Azerbaijani case study offers a rich examination of policy transfer within a post-Soviet context. However, the thesis must be cautious in extrapolating findings too broadly. Azerbaijan's unique history, political economy, and societal values could shape its response to external influences in ways not directly replicable in other countries. While the study contributes significantly to an understanding of VET reforms in countries with similar legacies, the need for additional comparative studies in diverse contexts remains essential for building a more robust theoretical understanding of the global-local policy dynamic.

9.3.2 Future research directions

This study on policy transfer in VET systems illuminates promising avenues for future research. Comprehensive comparative analyses across diverse post-Soviet states could reveal how distinct socio-political contexts shape the adaptation and efficacy of EU-influenced policies within national VET systems. While analyses of Baltic states were addressed, a systematic comparative study of VET systems across former Soviet countries remains to be conducted. Such research could identify common challenges and successful strategies, informing more effective policymaking and implementation. Additionally, it could shed light on under-explored theoretical nuances within the field of policy transfer scholarship. The unique historical and social circumstances of former Soviet countries offer a compelling context for further investigation.

Furthermore, longitudinal studies examining the long-term consequences of the EU's influence on VET systems within former Soviet countries hold considerable potential. Such research would offer invaluable insights into the sustainability of

implemented reforms, the evolving nature of policy enactment over time, and their lasting impact on both educational outcomes and labour market integration. These studies would significantly advance our understanding of the dynamic interplay between external policy influence and the enduring viability of reforms within a specific context.

Evaluation of specific EU initiatives and programmes within the European Education Area¹⁷, particularly within VET systems, presents a compelling avenue for further research. Systematic assessments of individual programmes could illuminate similarities and differences in outcomes and impact, as well as areas necessitating refinement, informing future policy adjustments. Additionally, investigating the perspectives of diverse stakeholders impacted by the EU's influence would provide a more nuanced understanding of the reforms' perceived effectiveness, relevance, and equity. Of particular interest is the expanding reach of the European Neighbourhood Policy, which extends from North Africa to the Middle East and Central Asia, where Europe increasingly exercises its soft power, as demonstrated in the case of Azerbaijan. Examining these diverse perspectives would enrich the scholarly discourse on educational reform, foregrounding the intricate interplay between external policy influence and localised needs.

Finally, a more profound theoretical debate is warranted regarding the merits of supply-led versus demand-led skills formation approaches within developing nations. This is particularly relevant when considering contexts characterised by static labour markets dominated by state-owned enterprises and underdeveloped small and medium-sized business sectors. These potential research directions highlight a key tension within the process of VET reform in developing countries. Should policy prioritise immediate labour market demands, potentially leading to a reactive skills formation system even when the demand is not structured? Or should the focus be on building a robust VET infrastructure capable of cultivating high-quality human capital in the long term, even if this means a temporary mismatch with immediate labour market needs and allocation of significant resources? Examining the adoption of global education policies offers one way to critically investigate this tension. Such research could reveal whether

¹⁷ comprising 49 European nations, builds on the Bologna Process to enhance education quality and accessibility through collaboration and frameworks established in 2010. [Homepage | European Education Area \(europa.eu\)](http://europa.eu)

standardization promotes quality and aligns VET with broader development goals or whether it constrains local innovation and responsiveness to specific contexts.

9.4 Concluding remarks

The culmination of this PhD journey into the globalization of VET policy-making has offered profound insights into the complexities of adopting Western paradigms, especially the demand-led model focused on aligning the VET system with labour market demands. This model, while prevalent in developed countries, is predicated on the existence of a clear and significant demand for a skilled workforce in the labour market. However, a pivotal distinction arises when applying this model to developing countries, where such demand may be virtually non-existent due to the absence of developed industries or service sectors or where the demand is minimal or there is a significant shadow market share in the economy. In these contexts, investing heavily in developing a VET system based solely on the economic demand-led paradigm could prove to be ineffective, if not futile. The assumption of a well-defined labour market demand, central to the demand-led approach, does not necessarily align with the realities of many developing countries.

The aforementioned discrepancy serves to emphasise the need for a more comprehensive dialogue on the formulation of vocational education and training policies that extends beyond the sole emphasis on economic requirements, whether for the state or the private sector. It is worth noting that, as demonstrated in the research, governments also utilise VET policies to advance their political objectives. In environments where the labour market does not present a clear demand for skilled labour, the rationale for a VET system must be reconsidered and expanded beyond the economic paradigm. Perhaps the purpose and aim of the VET system overall should be determined and reevaluated based on the type of political economy and social context. The development of VET systems in diverse contexts requires alternative concepts and paradigms that consider a wider array of objectives, including but not limited to social inclusion, personal development, and the potential to stimulate economic diversification and growth from within using entrepreneurship. Without this broader perspective, VET systems in developing countries risk remaining underutilised, unstructured, and underdeveloped, unable to fulfil their potential as a pillar of education and training.

Reflecting on these insights, it becomes evident that the discourse on VET policymaking in the context of globalization needs to be inclusive of diverse economic and social realities. This research underscores the importance of exploring VET policies that are not solely anchored in the context of global education policies but are informed by a nuanced understanding of the specific challenges and opportunities present in developing countries. As this chapter of academic exploration concludes, it calls for an expanded dialogue on VET policy, one that embraces multiple dimensions of development and education. Moving forward, the challenge lies in designing VET systems that are both responsive to global trends and deeply attuned to the unique contexts of developing nations.

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APPENDICES

Appendix 1

PARTICIPANT INFORMATION SHEET

Global Players, Local Changes: The European Union's Impact on Vocational Education Reforms in Azerbaijan

Majid Bayramli
School of Education, University of Glasgow

I would like to invite you to take part in the above-mentioned research study that I undertake as part of my PhD in Education degree. Before you decide, it is important for you to understand why the research is being done and what it will involve. Please read the following information carefully and discuss it with others if you wish. Ask the researcher/s if there is anything that is not clear or if you would like more information. Take some time to decide whether or not you wish to take part.

Thank you for reading this.

The purpose of the study is to determine the major factors that impact Azerbaijani policymakers' decision to embrace particular EU-supported vocational education and training mechanisms for reform of the sector. The duration of the research study is three years. It also attempts to examine the mechanisms by which European policy measures in the field of vocational education and training appear on Azerbaijan's national policy agenda, as well as to investigate and comprehend the contextual political, economic and cultural factors that influence national policymakers in their adoption or rejection of those policy ideas. Although the research's major goal is to better understand the policy borrowing relationship between the EU and Azerbaijan, it does so by focusing on the domestic (national) determinants of policy change in Azerbaijan

Because of your experience and expertise in policy processes between the European Union and Azerbaijan, your participation in the research is greatly important since it can shed the light to some of the decisions made for the reform of VET sector. Participation in this study is voluntary. Your participation will involve either online or face-to-face interview depending on your preference that will last between 30 minutes to 1 hour and it will be audio recorded with your consent. If you reject the recording, the interview will not be recorded. If you prefer face-to face interview, necessary COVID-19 (or any other infectious diseases) preventive measures (face masks, social distancing, etc.) will be taken depending on governmental regulations for the time being.

Copies of the interview data will be stored at the University of Glasgow electronic data based where encrypted files are secured with password. With your consent the anonymised research data will be retained for 10 + years to be accessible for reuse and to be shared via the open data repository in Enlighten: Research Data, the University of Glasgow's institutional data repository. In case of your rejection the interviewee transcripts will be deleted from all the location upon completion of the research.

Pseudonyms will be used in interview transcripts instead of your name. All your personal data including your name and contact details will be destroyed upon the completion of the project. I will maintain the confidentiality of all the research data, and you will remain anonymous in publications and the data will be deleted and removed in ten years.

I will send you email for enquires when the research is completed and give you information about accessing the findings if you wish so.

Please note that assurances on confidentiality will be strictly adhered to unless evidence of wrongdoing or potential harm is uncovered. In such cases the University may be obliged to contact relevant statutory bodies/agencies. The study is approved by the Research Ethics Committee of the Collage of Social Sciences of the University of Glasgow.

For further information please e-mail:

Researcher: Majid Bayramli: m.bayramli.1@research.gla.ac.uk

Supervisor: Prof Oscar Valiente oscar.valiente@glasgow.ac.uk

To pursue any complaint about the conduct of the research: please contact the College of Social Sciences Ethics Officer, Dr Susan Batchelor, email: susan.batchelor@glasgow.ac.uk

Appendix 2

PRIVACY NOTICE

Privacy Notice for Participation in Research Project: Global Players, Local Changes: The European Union's Impact on Vocational Education Reforms in Azerbaijan.

Researcher:

Majid Bayramli

Your Personal Data

The University of Glasgow will be what's known as the 'Data Controller' of your personal data processed in relation to your participation in the research project 'Contextual factors that influence the convergence to the EU policy in vocational education and training of non-member neighbourhood countries'. This privacy notice will explain how The University of Glasgow will process your personal data.

Why we need it

We are collecting basic personal data such as your name and contact details in order to conduct our research. We need your name and contact details to potentially follow up on the data you have provided.

We only collect data that we need for the research project and de-identified data (i.e., a reversible process whereby identifiers are replaced by a code, to which the researcher retains the key, in a secure location) will be used. Please note that your confidentiality may not be possible to guarantee if evidence of wrongdoing or potential harm is uncovered. Please see accompanying **Participant Information Sheet** for more details.

Legal basis for processing your data

We must have a legal basis for processing all personal data. As this processing is for Academic Research, we will be relying upon **Task in the Public Interest** in order to process the basic personal data that you provide. For any special categories data collected we will be processing this on the basis that it is **necessary for archiving purposes, scientific or historical research purposes or statistical purposes**

Alongside this, in order to fulfil our ethical obligations, we will ask for your **Consent** to take part in the study. Please see accompanying **Consent Form**.

What we do with it and who we share it with

All the personal data you submit is processed by: Majid Bayramli who is a PhD student at the University of Glasgow in the United Kingdom. In addition, security measures are in place to ensure that your personal data remains safe: such as pseudonymisation, secure storage, and encryption of files and devices. Please consult the **Consent form** and **Participant Information Sheet** which accompanies this notice.

We will provide you with a copy of the study findings and details of any subsequent publications or outputs on request.

What are your rights?

GDPR provides that individuals have certain rights including: to request access to, copies of and rectification or erasure of personal data and to object to processing. In addition, data subjects may also have the right to restrict the processing of the personal data and to data portability. You can request access to the information we process about you at any time.

If at any point you believe that the information, we process relating to you is incorrect, you can request to see this information and may in some instances request to have it restricted, corrected, or erased. You may also have the right to object to the processing of data and the right to data portability.

Please note that as we are processing your personal data for research purposes, the ability to exercise these rights may vary as there are potentially applicable research exemptions under the GDPR and the Data Protection Act 2018. For more information on these exemptions, please see [UofG Research with personal and special categories of data](#).

If you wish to exercise any of these rights, please submit your request via the [webform](#) or contact dp@gl.a.ac.uk

How long do we keep it for?

Your **personal** data including your name and contact details will be destroyed upon the completion of the project by December 2024.

Your **research** data will be retained for a period of ten years in line with the University of Glasgow Guidelines. Specific details in relation to research data storage are provided on the Participant Information Sheet and Consent Form which accompany this notice.

Complaints

If you wish to raise a complaint on how we have handled your personal data, you can contact the University Data Protection Officer who will investigate the matter. Our Data Protection Officer can be contacted at dataprotectionofficer@glasgow.ac.uk

If you are not satisfied with our response or believe we are not processing your personal data in accordance with the law, you can complain to the Information Commissioner's Office (ICO) <https://ico.org.uk/>



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Appendix 3

Consent Form

Title of Project: Global Players, Local Changes: The European Union's Impact on Vocational Education Reforms in Azerbaijan.

Name of Researcher: Majid Bayramli

Please tick as appropriate

Yes No I confirm that I have read and understood the Participant Information for the above study and have had the opportunity to ask questions.

Yes No I understand that my participation is voluntary and that I am free to withdraw at any time, without giving any reason.

Yes No I consent to interviews being audio-recorded

Yes No I acknowledge that participants will be referred to by pseudonym.

I agree that:

Yes No All names and other material likely to identify individuals will be anonymised.

Yes No The material will be treated as confidential and kept in secure storage at all times.

Yes No The material will be retained in secure storage for use in future academic research

Yes No I acknowledge the provision of a Privacy Notice in relation to this research project.

I agree to take part in this research study

I do not agree to take part in this research study

Appendix 4.

Interview questions

Introduction

1. Could you please tell me about your involvement in the reform of the VET sector in Azerbaijan, your role and the period during which you participated?
2. What was the perception of the vocational education and training system on the eve of the reform process?

Reform triggers

3. What were the main challenges the government was facing that triggered the reform of the VET system? Were these challenges new? Why do you think VET was chosen to address those challenges now?

Actors

4. Who were the main actors involved in the reform process, and what was the degree of involvement? Which actors were left aside and why?

Proposed solutions

5. What structural problems was the VET system meant to address? Which policy ideas were presented by each actor, and what was their motivation for proposing these solutions?

Opposition

6. Was there any resistance to the reform process? By whom? Why? What was the character of resistance? What was the result?

Retention

7. How was the VET sector shaped as a result of reform? What was a novelty? What ideas were accepted, and what ideas were rejected?
8. Do you think the mechanisms, tools and solutions that were adopted are appropriate for addressing the main challenges? Why? What challenges remain unaddressed?

Hidden questions

- Why there was no VET reform until 2007?
- Why was the EU supporting the VET reform?
- Why was the focus of the EU and government on VET, not higher education?
- Why has Reform lost momentum?

Appendix 5

. Overview of the study participants

| Pseudonym | Role in Policy Change Process | Reason for Interview |
|---|---|---|
| Former high-rank official of the Ministry of Education | Decision-maker in VET policy formulation and implementation between 1998-2013 | Since he was a key decision-maker in not only VET but also in the education sector, his insight shed light on certain policies and decisions |
| Former VET manager in the Ministry of Education | Responsible for the VET system within the Ministry of Education between 2009 and 2013 | He was responsible for the VET system within the Ministry of Education between 2009 and 2013. During his time, the first contacts with the EU in the field of VET were established, and the first projects were initiated. He was also responsible for the implementation of the VET State Program between 2007-2012. He was the contact person with ETF and initiated the Torino Process in Azerbaijan |
| Manager in the Ministry of Education | Long-standing bureaucrat and education policy implementer, having worked in the Ministry of Education since the early 2000s | His extensive experience in VET policy development and implementation, as well as his close working relationships with multiple Ministers of Education and other stakeholders, make him a valuable source of insights into the policy change process. His role as a key liaison between the Ministry of Education and other ministries and stakeholders has provided him with a unique perspective on the challenges and opportunities of VET policy reform. Additionally, his experience in implementing and monitoring the Strategic Roadmap for the development of VET and negotiating the drafts of the VET Law makes him a knowledgeable expert on the specifics of VET policy change in Azerbaijan. |
| VET Agency representative | Responsible for the VET system between 2013-2015 | She was responsible for the VET system between 2013-2015, during which time she played a key role in the creation of the State Agency for Vocational Education and the development |

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| | | of relations between VET institutions and the labour market. |
| Former manager of VET Agency | Managed the VET Agency between 2019-2021 and managed donor coordination in the Ministry of Education between 2013-2019 | He served as the manager of the VET Agency between 2007-2013 and 2019-2021, playing a pivotal role in implementing the State Program for Development of VET and establishing the Torino Process in Azerbaijan. Prior to joining the Ministry of Education, he held a position at the EU delegation, managing EU projects within the country. After 2013, upon invitation from the Minister of Education, he joined the ministry to oversee donor coordination and attract EU-funded projects. His expertise extends to technical assistance and grant projects in VET systems, where he has made significant personal contributions. He also managed the VET Agency after 2019 and witnessed the challenges of implementing the VET LAW. |
| Former manager of VET Agency | Joined the Ministry of Education in 2015 in the role of Advisor to the Minister, later led the establishment of VET Agency, managed the institutions, and led the process development of Law on Vocational Education. | Invited based on involvement in establishing the VET Agency, managing VET institutions, and leading the development of the Law on Vocational Education. |
| European Union (EU) representative | Responsible for the design, delivery, and management of EU technical assistance projects in the EU delegation of Azerbaijan | Selected for the interview due to extensive expertise in EU-Azerbaijan cooperation in the field of VET, involvement in the development and implementation of VET policy reforms, and provision of technical assistance and funding for VET projects. As a key liaison between the EU and Azerbaijan, they have played a pivotal role in facilitating dialogue and cooperation on VET reform initiatives. |

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| <p>European Training Foundation (ETF) representative</p> | <p>Joined the policy change process in 2016 after the establishment of the VET Agency. Played a role as a liaison between ETF, the EU, and Azerbaijan regarding bringing European Experience to the Azerbaijan VET system. Responsible for designing EU projects in the field of VET and monitoring the Azerbaijan VET system using the Torino Process.</p> | <p>Selected for interview due to expertise in VET policy and practices, involvement in facilitating EU-Azerbaijan cooperation on VET reform, and contribution to the development and implementation of VET projects in Azerbaijan. As a liaison between ETF, the EU, and Azerbaijan, they have played a crucial role in introducing European approaches and methodologies to the country's VET system. Additionally, she was a key lobbyist in integrating tools and mechanisms favoured by the EU into the VET Law and other VET-regulated documents.</p> |
| <p>Former ETF representative</p> | <p>Served as the first contact person between the ETF and the Ministry of Education of Azerbaijan in the early 2000s. Played a pivotal role in advocating for the adoption of the National Qualifications Framework (NQF), occupational standards, and qualification standards in Azerbaijan's VET system.</p> | <p>Invited due to their pioneering contributions to introducing European-based VET practices in Azerbaijan. Their efforts in establishing the NQF and promoting occupational and qualification standards laid the foundation for further VET reforms in the country.</p> |
| <p>Labour Ministry representative</p> | <p>Oversaw VET and adult training for unemployed people from the early 2000s until 2022. Initiated projects with UNDP for the development of VET centres under the Ministry of Labour. Key person in the cooperation between the ETF and Ministry of Labour during the policy change process.</p> | <p>Invited due to their extensive experience in VET for the unemployed and long-standing collaboration with the ETF on VET reform initiatives. Their contributions have been instrumental in aligning VET programs with labour market needs and promoting skills development for unemployed individuals. To gain insights into the Ministry of Labour's resistance to certain provisions of the VET Law, as well as to understand the interministerial disputes and corporate interests between the Ministry of Education and the Ministry of Labour that emerged during the policy change process.</p> |

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| VET Strategic RoadMap developer | Part of the McKinsey & Company team responsible for developing strategic roadmaps between 2015-2017. | Invited due to their participation in the development of the VET Strategic RoadMap and their insights into the decision-making process at the highest levels of government. |
| EU Technical Assistance Expert | Served as a senior expert within the EU-funded technical assistance project between 2016 and 2020. | Invited due to their involvement in the development of the VET Law and introduction of European tools and mechanisms in VET. |
| Ministry of Economy representative | Held a senior position in the Ministry of Economy until 2015 and then was invited to the VET Agency to participate in the development of the VET Law, where they served in a senior role until 2020. | Invited to understand the position and objectives of the Ministry of Economy for the VET system. |
| German dual model representative | Worked as a project manager for the German GIZ organization between 2012 and 2020, which was awarded an EU-funded grant project to introduce dual education in Azerbaijan. | Invited to understand the objectives of GIZ in introducing dual education in Azerbaijan and their experiences during project implementation. |
| British apprenticeship model representative | Invited by the British Council to work as a senior expert in introducing the apprenticeship system in the Tourism industry between 2015 and 2019. | Invited to understand the extent of British influence in shaping the VET Law and the challenges faced in introducing apprenticeships into Azerbaijan's VET system. |
| Entrepreneur confederation representative | Held a position in the German-Azerbaijani Chamber of Commerce from 2010 to 2017 and later became part of the National Confederation of Entrepreneurs (Employers) Organizations of Azerbaijan. | Invited to understand the perspective of industry and employers regarding the VET Law. The aim was to gauge their views on the effectiveness of the VET system in meeting the skills needs of the labour market and identify opinions of both local and German companies towards the VET. |
| Employer representative | Founder and owner of one of the oldest private companies started in 1994. | Invited due to their early introduction of apprenticeship programs for VET graduates, their advocacy for the importance of vocational education, and their participation in German-funded projects aimed at introducing dual education in Azerbaijan. |

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| EU expert | Engaged in the VET system reform process between 2015-2020. | Invited to understand the rationale behind the ideas that originated from his preliminary reports, as well as his interactions with stakeholders during the preliminary analysis phase. His insights were crucial in shaping the direction of the reform and informing the establishment of the VET Agency and other key mechanisms incorporated into the VET Law. |
| VET school manager | Managed a VET school in the capital city that actively participated in the policy-making process by providing feedback on draft laws and regulations and piloting new VET initiatives. The school also served as a testing ground for the apprenticeship system under EU-funded projects. | Invited to gain insights from a practitioner's perspective on the policy-making process and the impact of policy changes on VET schools. Their experiences provided valuable feedback on the effectiveness of the reforms and identified areas for further improvement. |
| Regional VET school manager | Managed a VET school in a regional area and actively participated in the policy-making process by providing feedback on draft laws and regulations and piloting new VET initiatives. The school also served as a testing ground for various tools and mechanisms of the EU. | Invited to understand how regional VET schools were involved in the policy change process and how they perceived the adaptation of EU mechanisms to the Azerbaijani context. Their insights provided valuable perspectives on the challenges and opportunities of implementing EU-inspired reforms in regional VET settings. |
| Private VET school manager | Managed the only private VET provider in Azerbaijan and actively participated in skills development and charging fees to students. | Invited to understand how the change process affected private VET providers since the initiative was mainly government-led. The interviewee's insights provided valuable perspectives on the challenges and opportunities of implementing EU-inspired reforms in the context of private VET provision in Azerbaijan. |

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| ADB expert | Involved in the development of skills formation systems in Azerbaijan by the World Bank, Asian Development Bank, and EU. | Invited to gain a non-European perspective on the policy change process in Azerbaijan's VET system. The expert's insights provided valuable comparisons and contrasts with European approaches and highlighted the importance of considering local contexts and needs when implementing VET reforms. |
| Labour market expert | Involved in the development of labour market intelligence systems in Azerbaijan and served as a focal point for the ETF and the Institute for the Study of Labour Markets in Azerbaijan before 2013. She was the designer of the ETF initiative that eventually led to the establishment of the Labour Market Observatory. | Invited to gain insights into the early developments in the field of VET with regard to integrating labour market needs into the VET system. Her expertise provided a valuable perspective on the expectations of the labour market from the VET system and helped me understand the importance of aligning VET programs with labour market demands. |
| Adult education provider | Managed the only private adult education provider that also serves as upskilling and reskilling for the unemployed. | Invited to understand the extent to which the new VET Law enables public-private VET initiatives for adult education providers and how the government supports private initiatives in the VET sector. Their insights provided valuable information on the challenges and opportunities for private providers in the context of the new VET Law and government policies. |