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## *International and Global Issues for Research*

*An analysis of the growth of transnational corporations operating international schools and the potential impact of this growth on the nature of the education offered*

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## Abstract

Since the earliest international schools appeared on the scene, arguably after the First World War, the number of such schools has grown significantly. In a globalized world characterized by greater economic, social, political, cultural activity crossing national boundaries the demand for schools from transnational elites has grown, and continues to grow, at pace. The demand for international schooling is also being augmented from those local elites wanting to gain some positional advantage in the form of international qualifications and associated skills sets. Increasingly the demand for international school education is being met by for-profit corporations that are starting up or buying up international schools around the world. These transnational corporations (TNCs), often financed by private equity firms or share issues have identified the international school sector as both financially lucrative and recession proof. One key question to consider is whether as a consequence of this commercial activity the nature of the education offered by TNC-owned international schools will change. International school education is much contested. One framework for conceptualising it involves a continuum between an ideological interpretation focusing on an internationalist approach and an instrumentalist interpretation focusing on the pragmatic educational needs to succeed in a globalized world. The paper suggests that TNC may position their schools towards the more pragmatic end of a continuum of international school education and considers the possible implications of this positioning.

# Introduction

This paper explores the changing face of the international school sector with a particular emphasis on examining the emergence of chains of international schools owned and run by for-profit transnational corporations (TNC). It suggests reasons for the growth of TNCs before going on to explore how and why they might affect the nature of the education offered by the schools they operate. It concludes by considering the implications of these changes.

## Globalization and the impact on education

In contextualising the development of international schools it is important to acknowledge the influence of the process of globalization. Whilst the causes and effects of globalization are highly contested and open to interpretation and debate (Henry et al., 1999; Tikly 2001) there appears to be some consensus, at least in general terms, as to what globalization means. Kelly (2009, p51) describes it as the *"process by which countries and their citizens are increasingly drawn together".* Held et al (1999 p5) refer to it as the *"widening, deepening, and speeding up of worldwide interconnectedness in all aspects of contemporary social life".* This drawing together and global interconnectivity has resulted in *"transcontinental or interregional flows and networks of activity, interaction and the exercise of power"* (Held et al, ibid).

These flows, involving the movement of people, enterprise, capital, finance, ideas and technology have significant implications for education. Hayden (2011) suggests that the nature of education itself has been changing in response to globalization in two ways. Firstly, policymakers and institutions in national systems are *"tangling"* with how to internationalise the school experiences that young people are exposed to. Hayden argues that in a more interconnected globalized world the traditional rationale for constructing a national curriculum that prepared *"young people for an adult life similar to that of their parents own adulthood"* is no longer so certain. Indeed, she suggests that the *"only point of certainty is that what the curriculum is preparing young people for, is NOT simply a future constrained by national boundaries and national issues"* (Hayden, 2011 p212*).* The life experiences of young people are now influenced by global players and processes and national education systems must prepare them for interaction with these.

Secondly new forms of schooling outside the direct control of national governments have been growing in number and influence in response to emerging aspirations and perceived needs of globally mobile populations of 'global citizens'. Robinson (2004) positions these global citizens into three tiers.

- Transnational capitalist elite
- Peripheral casualised workers

- Structurally excluded

At the top of the pyramid sits a transnational capitalist elite that includes those in tenured positions in institutions operating within the global economy and enjoying the resultant material and financial rewards. They would include those in senior positions within multinational corporations and agencies. Bates (2011) argues that many of these privileged global citizens imagine themselves conforming to a 'cosmopolitan ideal' and require an education consistent with this. This group also includes aspirant local wealthy elites from less developed and emerging economies, many of whom are benefiting from the opportunities derived from globalization, and looking to enrol their children in elite education institutions such as international schools (Lowe, 2000). They are either dissatisfied with the opportunities offered by local schools within their national education systems or are wanting international qualifications in response to a *"stiffening of the local positional competition on the one hand and a globalization of that competition on the other"* (Lowe, 2000 p27). The growth in the number of this elite group has therefore led to an increase in demand for international schools and programmes that meets their various demands.

Alongside these elite sit the marginalized '*global proletariat' (*Robinson, 2004). Members of this second tier includes unskilled, semi-skilled and skilled manual labour who face un-tenured employment conditions and are often reliant on relatively low paid short term contractual or casual employment from firms reaping the rewards of globalization. As a consequence they often live precarious existences. The third group are divorced from the globalization process altogether and are *'structurally excluded'* from productive activity (Robinson ibid). For financial reasons neither of these groups have been targeted by international schools. Whilst these groups and the schools that serve them are, therefore, not the focus of this paper it is perhaps interesting to reflect upon what sort of 'international education' the children of the disenfranchised and marginalized should experience.

## International education and international schooling

It is perhaps helpful at this point to consider the phenomenon of international schools and their relationship to the broader and more ambiguous concept of international education. International education has become an umbrella term for a number of areas of study and used as a label used in multiple contexts (Cambridge and Thompson, 2004). Husen (1985, p2660) description of international education as *"including all educative efforts that aim at fostering an international orientation in knowledge and attitudes"* emphasises the breadth of the discourse devoted to the subject. However the term international education has been commonly used in association with

comparative education and the comparison and analysis of different national education systems. The term is also associated with *"the practical involvement in education in developing countries" (Lowe, 2000).* Crossley and Watson (2003) use international education in the context of international schools when defining international education *"as the work and the study of international schools".*

In an attempt to introduce some clarity to this apparent ambiguity Hayden (2011) draws upon the work of Dolby and Rahman (2008) by suggesting international education can be represented by a set of six interlocking circles each with a distinct area of study focusing on a different interpretation of international education albeit with areas of common ground. These include comparative and international education, internationalization of higher education, international schools, international research on teaching and teacher education, internationalization of school level education, globalization and education. The occurrence of international education programmes such as those offered by the International Baccalaureate, developed in international schools, but now well established in state education systems and non-international schools illustrates the complex and developing nature of the concept. The idea that international education is what international schools do appears to be overly simplistic and does not recognise that both national private and state schools, national or international can offer an international education if so inclined (Hill, 2012). The focus of this paper however will be on the 'international schools' and the international education variant they offer.

Cambridge and Thompson (2004) propose that the nature of international education in schools takes on two *"contrasting forms in response to the ideologies of internationalism and globalization". "Internationalist"* education or education for international mindedness where global peace, respect for the ideas of different nations and cultures, and concern for global issues are key drivers of the educational process. The International School of Geneva founded after the First World War in 1924 in connection the League of Nations and the United Nations was a school that had an explicit goal to *"imbue an earnest belief in internationalism"* (Hill, 2012). Increasingly, qualities and attributes such as 'international mindedness' have become established within the lexicon of those individuals and institutions wanting to articulate the outcomes associated with internationalism and intercultural awareness. Hill's interpretation of education for international mindedness is a useful contribution to the debate, He defines it as *"the study of issues which have application beyond national borders and to which competencies such as critical thinking and collaboration are applied in order to shape attitudes leading to action which will be conducive to intercultural understanding, peaceful coexistence and global sustainable development for the future of the human race"* (p 259).

In contrast to this 'internationalist' form of international education Cambridge and Thompson (2004) also identify a more pragmatic *"globalist international education"* that prioritizes the imperative to

meet the instrumental needs of their globally mobile students and their parents. An education that develops the requisite knowledge, understanding, skills and capabilities to have a fulfilled life either back at home or wherever they locate; and to prepare them and furnish them with the necessary qualifications to move successfully to the next stage in their education in a range of national contexts.

Whether this distinction between an perspective based on an internationalist ideology and a perspective based on a pragmatic and instrumentalist globalist view is a dichotomy (Matthews, 1989) or a continuum (Waterson and Hayden,1998; Hayden 2006) the reality for most schools, national and international, public and private, irrespective of any underlying internationalist ideology, is that the education they provide must to some extent acknowledge their instrumentalist or pragmatic function in terms of enabling students to progress to the next stage of education and ultimately the world of work. The notion of a continuum between a pragmatic, instrumentalist approach, and an ideological one, however, raises some key philosophical and practical questions for international schools that are particularly apposite given some of the developments that are taking place in the international school market

- Where are schools positioned on a continuum?
- Who does the positioning?

## The changing nature of the international school market

### The growth in international schools

Matthew's (1989) assertion that to "generalise about international schools is likely to produce little that is worthwhile, given the variety of institutions that describe themselves by the umbrella term" may have been true in the 1980s but may have to be reassessed in light of developments in the market for international school education.

Although there is some debate as to when international schools first appeared on the scene. Bunnell (2008) and Sylvester (2002) both note that whilst international schools originated in the 19th Century it was after the First World War that international schools started to appear in larger numbers. Two of the earliest, The International School of Geneva in Switzerland and Yokahama International School in Japan, both founded in 1924, were established to cater for the children of diplomats and employees of transnational corporations (Hayden, 2011). Following the Second World War more and more schools catering for the globally mobile expatriate community appeared in various guises.

English and American overseas schools were established to meet the demand from transient expatriate communities by recreating English language national education experiences by adopting English and US programmes and creating school cultures and ethos that replicated those in the home countries of their respective students. Overseas schools based on other national systems also appeared and catered for their country's expatriate workers such as German (AGIS, 2014) French (France Diplomatie, 2014) and Japanese Schools (Japanese Overseas Education Services, 2014).

International schools emerged that catered for the diverse nature of the expatriate communities by offering more than one national education programme within the same school e.g. combining English Advanced Levels with US Advanced Placement, English and German National curricula. Some offered international programmes such as those of the International Baccalaureate (IB) either as whole school approaches or in combination with other national or international programmes. Hayden and Thompson (1995 p332) concluded that the *"body"* of international schools was a *"conglomeration of individual institutions which may or may not share an underlying educational philosophy*".

More recently, the *"traditional form of international school has been supplemented by another form of international school aimed principally not at the expatriate but at the host country aspiring middle class"* (Hayden, 2011 p216). Indeed Hayden and Thompson (2013) have included these schools as a separate category in a recent typology of international schools. Brummitt and Keeling's (2013) observation that international school enrolment is increasingly dominated by the richest 5% of non-English speaking parents looking for international schools in their own countries would appear to support this view. The increased interest from local wealthy elites seeking credentials for their children that give them positional advantage and preferential access to higher education and career opportunities is arguably going to have a significant impact on the nature of international schooling in the future. The aspirations and expectations of these elites may create new pressures on the way international schools operate and evolve.

It is estimated that the number of international schools grew from around 50 schools in 1964 to approximately 1000 in 1995 (Hayden and Thompson, 1995). It is however difficult to estimate with any degree of reliability how many 'international schools' currently exist globally. Data from the International Schools Consultancy Group (ISCG, 2013), a UK consultancy and data service organization specialising in international schools, albeit based on their own criteria for defining what constitutes an international school, maintains there are 6899 'international' schools. These are schools that operate wholly or partly in English, irrespective of curriculum in countries where English is not the first language (Glass, 2013). When schools offering the IB programmes not already included in the above definition are added, and private and state schools that offer international

curriculum other than the IB such as the International Primary Curriculum are also included the total number rises to *"eight and a half thousand"* (Glass ibid). Although Drake (2011) expresses concerns about reliability of these figures because of the fundamental problem of agreeing on the criteria for determining what constitutes an international school, the number of schools listed supports Brummitt and Keeling's (2014) assertion that international schools represent a sizable and growing market-a market characterized by considerable diversity in terms of the clientele (the demand), how schools reconcile the ideological and pragmatic interests (the product) and how the school providers are organized (the supply). Cambridge and Thompson (2004) conclude that the heterogeneous nature of the market results from the 'reconciliation' between internationalist and globalist perspectives being played out in institutions each with their *"own unique set of historical, geographical and economic contexts".* This heterogeneity reflects, firstly, the variations in interpretations of international school education along an ideological and pragmatic continuum, and secondly that individual schools appear to have considerable agency as to where they are positioned along the continuum.

## The shift from not-for-profit to for-profit status

However this heterogeneity and school autonomy may change as other behavioural aspects of the international school sector start to exert an influence. Forty years ago most international schools were of a not-for-profit nature (Brummitt and Keeling, 2014). However in recent years the distribution between not for-profit and for-profit appears to have switched. Brummitt and Keeling (ibid) suggest that now over half of all international schools operate on a for-profit basis. Of the 6730 international schools in the main ISC database (ISCG 2013) the profit status of only 2799 is 'known'. Of these 1765 (63%) are identified as for-profit schools and 1034 (37%) designated 'not for profit' (Glass 2013). Ignoring the more fundamental questions such as what is meant by profit in this context, and how precisely profit acts as a motivator, as well as those relating to the accuracy and reliability of the dataset there does appear to be an increasing trend towards profitability as a driver of international school education.

This change should perhaps be put in the broader context of a changing orthodoxy about how education generally is being offered. Ball's (1993 p 3) assertion that *"there is now in educational policy a well-established, powerful and complex ideology of the market and a linked culture of choice which are underpinned by dangerous idealisations about the workings of markets, the effects of parental choice and of 'profit' incentives in education"* supports the view that there is a growing acceptance of neoliberal ideas in educational provision around the world. Neoliberal theorists such as Chubb and Moe (1988), Horowitz (2011), Tooley (1997) and Sahlgren (2011) argue strongly in

favour of the adoption of private education and market-based solutions to educational provision in both developed and developing countries. They argue that competition, consumer choice, private enterprise improve not only the quality of the educational service through increased autonomy and rigour but also its accessibility. Availability is enhanced as supply responds to demand.

The increase in the number of for-profit international schools suggests a growing acceptance of neo-liberal market-based orthodoxy in the international school sector. New types of commercial organization, recognizing that the provision of international schooling for the children of internationally mobile workers as well as the aspirant middle class parents in emerging markets is extremely lucrative, are appearing in the international school market. The somewhat ad hoc and heterogeneous nature of international schooling (Cambridge and Thomson 2004) is evolving and a 'new order' based on commercial interests and the profit motive is becoming established. Drake (2011 p 146) alludes to this when referring to the 'new international school market' being one *"increasingly characterised by proprietary, profit making, organisational structures".* This raises a fundamental question about what impact the profit motive will have on the positioning of international schools on the continuum between the ideological and the pragmatic interpretations of international education. Will the pressure to survive and flourish in the marketplace lead to a movement towards a more pragmatic, market orientated and less ideological orientation? Or will the demand for an ideologically 'internationalist' education be supplied by commercial firms operating within the market?

Limited research has been undertaken into the growth of the for-profit sector in international schooling. Bunnell (2008) has analysed one emerging model, specifically a non-equity franchise system, used by high profile English independent schools that establish branches overseas. Dulwich College, Harrow, Shrewsbury and Repton Schools all operate franchise arrangements in Asia. Others including Wellington School, Brighton College and Oxford Girls Schools are considering similar arrangements (Bunnell, ibid). The franchisees do not necessarily replicate the same experience as the parent institutions but they trade on their reputation and draw upon some of their resources in setting up and operating the schools (Bunnell, ibid). Such initiatives mirror the business development practices of some universities around the world where overseas campuses have been opened to recruit local populations of students looking for a higher status alternative to the local tertiary sector. Kauppinen (2012) and Marginson (2004, 2013) have written extensively about the motives, merits and demerits of this version of this so called 'academic capitalism'. Little, however, is known of the precise motivations, business models, modus operendi and impact of similar models when applied to primary and secondary education. This is an area worthy of further investigation and analysis, particular when some national governments are reportedly advocating that state

schools might be interested in starting up overseas branches to supplement their income (Miller 2013).

## The emergence of Transnational Corporations as operators of international schools

One model of commercial provision of international schooling that is becoming more evident involves for-profit enterprises operating chains of international schools (Hayden, 2011). Such business organization could be described as a transnational corporation (TNC). UNCTAD (2014) defines TNCs as *"incorporated or unincorporated enterprises comprising parent enterprises and their foreign affiliates. A parent enterprise is defined as an enterprise that controls assets of other entities in countries other than its home country, usually by owning a certain equity capital stake."*

In the context of international school provision the parent enterprises locate in one country own and operate a number of branded international schools in different countries. Table 1 gives some examples.

Table 1

| **TNC** | **Number of schools** | **Countries where schools operate** | **HQ** |
|---|---|---|---|
| GEMS Education | 71 | China (1),Egypt (2),India (11),Jordan (1),Kenya (1),KSA (2), Libya (1),Singapore (1) Switzerland (1),UAE(41),Uganda (1). UK (6), USA (2) | Dubai |
| Nord Anglia Education | 28 | China (6),Switzerland (3), Poland (1), Slovakia (1), Hungary (1), Spain (1), Czech Republic (1), Thailand (2), UAE (2), Qatar (4), USA (6) | Hong Kong |
| Cognita | 65 | UK (43), Chile (9), Spain (4), Singapore (2), Thailand (3), Vietnam (3), Brazil (1) | UK |
| Belleview Education | 11 | UK (9), Switzerland (2) | UK |
| Taalem | 9 | Dubai (8),Abu Dhabi (1) | Dubai |

Information gained from the organizations websites

It is not surprising that commercial organizations are targeting the international school sector. Ball (2009) observes *"increasingly the education businesses, like other firms, are seeking to diversify and internationalise and are continually looking for new market opportunities."* International schools have been identified by TNCs as an area of strong potential growth and profitability. In 2004 Andrew Fitzmaurice, the former Chief Executive Officer of Nord Anglia was quoted as saying *"International Schools are a very good business for us: a growth business. We make a 40% return on capital."* (Education and Training Services, 2004). It is difficult to quantify the absolute size of the potential financial gains. In 2005 Macdonald's (2006) analysis of school population and fee data from the Council of International Schools (CIS), an international school accrediting agency, suggested that with 1000 CIS recognised international schools the total estimated revenue ranged between US$3.2 and US$5.3 billion. Given the subsequent growth in the number of international schools the total revenue would be expected to be significantly greater. Furthermore international schooling because of its transnational nature and therefore lack of reliance on any one single economy is judged as being relatively recession proof (Kannadiga, 2013). The financial stakes are therefore high and are attracting considerable interest from new sources of external finance that are acutely sensitive to machinations of the market place.

## Explaining the growth of transnational corporations as international school providers

Whilst TNCs may have been started by individual entrepreneurs or philanthropists, their growth ambitions often require access to capital markets to raise capital investment for expansion. The building of new schools, the acquisition of existing ones or the taking over of other TNCs requires significant financial investment. Private equity and venture capital firms such as Abraaj Capital, Sovereign Capital, Barings Private Equity Asia, and Kohlberg Kravis Roberts have provided equity capital to finance investment to GEMS Education (Sharif, 2013), WCE (Sovereign Capital, 2014), Nord Anglia (Baring Private Equity Asia 2008), and Cognita (Educator Investor, 2013) respectively.

Private equity firms buy businesses with the intention of increasing their efficiency and productivity prior to selling them on at a profit (Investopedia, 2014a). Venture capital firms are types of private equity firms that typically provide financial capital to companies in the early stages of their development where there is a corresponding higher level of risk. In return for their equity venture capital firms usually expect representation at board level and higher returns (Investopedia, 2014b). The activity of venture capital firms in the international school sector suggest that both the short term financial returns from their investment are attractive, and involvement in schooling in emerging markets offers the prospects of attractive longer term yields. Some TNCs, given their

public limited company status, have raised investment capital by publically issuing shares through stock market floatation. Additionally during periods of economic stability and low interest rates, borrowing through the selling of corporate bonds has also be used to obtain investment capital although financing through debt is considered by some a potentially risky option given the possible repayment and interest burden (Wall Street Journal, 2013). The role, motivation and influence of equity and bond owners in the international school sector are all interesting issues worthy of further investigation. In particular what direct or indirect influence, if any, financiers and shareholders have on how and where international schools run by the TNCs are positioned on the ideological and pragmatic continuum. This will be explored in more detail later. Whatever the motives behind the investment, the involvement of external capital appears to be fuelling the rapid growth of TNC owned international schools.

The growth performance of TNCs over recent years has been impressive. Nord Anglia has reported annual growth rates in profitability in the region of 20% (Nord Anglia Education, 2013). Cognita has experienced a growth in its international sales revenue of 34.6% (Sunday Times, 2013). Equally future growth aspirations are even more ambitious. Sunny Varkey, the founder and CEO of GEMS Education, reportedly expressed a desire to have 5000 schools operational by 2025. (Woodward, 2005) With such growth performance and ambition TNCs are clearly becoming established players in the market for international schooling. Prior to considering the implication of this growth it may be helpful to examine the advantages they have that enable them to attract external finance and grow so successfully?

Dunning (1981) identifies three broad areas in which transnational corporations in the service sector can experience advantages.

- Ownership specific advantages resulting from businesses having "internal capacities and capabilities" to meet the demands from the customers
- Location specific advantages arising because of factors specific to a particular location
- Market internalization advantages arising because of issues relating to the locus of ownership and control

## Ownership specific advantages

The quality and experience of school leaders and teachers and the TNCs' ability to recruit highly trained effective educators are highlighted by most TNCs as one key set of capacity and capability factors. Phrases such as *"outstanding team of education professionals"* (Nord Anglia Education, 2014), *"team of world renowned educators" (*Gems Education 2014), and *"commitment to hire and*

*retain outstanding teachers and school leaders*" (Cognita, 2014) appear on the respective organizations' websites.

The ability to recruit in different national labour markets and from other international schools would appear to be important in giving TNC-owned schools a competitive advantage in delivering 'high quality' international education. Canterford (2009 p383) argues that *"the majority of international schools, whenever possible and finances allowing, look to employ Western trained, English-speaking teachers who preferably have previous experience of the curricular being offered".* Nord Anglia requires all its teachers to be *"fully qualified and have significant teaching experience in national or international schools"* (Nord Anglia, 2014). GEMS Education also recruit internationally drawing upon a global pool of skilled and qualified professional educators normally trained in their home countries. They are reported to be the largest employer of British teachers outside of the UK and the largest employer of Indian teachers outside India (Sharif 2013). Furthermore Cognita (2014) emphasises the need to maintain the capabilities of their teachers and leaders with high quality professional development as well as having effective teacher appraisal and quality assurance systems in place.

However, whilst the professional capabilities and qualifications of practitioners are important it is how their endeavours are channelled into enabling students to achieve success in external examinations and test results that are of arguably greater significance when marketing schools. Excellent results in external examinations, favourable comparisons with global, regional and national examination data and university admissions data (notably at world renowned universities) are key indicators used by TNCs to promote their capability (Nord Anglia Education, 2014; GEMS Education, 2014).

Efficiencies resulting from growth itself can also enable TNCs to further reduce their unit costs. The centralization of management system development and implementation, curriculum design, professional development planning and provision, campus design, quality assurance and marketing across all their schools are all areas where TNCs can achieve cost savings and gain an edge over the competition.

## Location specific advantages

The strength of relationships between TNCs and governments and other multinational corporations are important in becoming and remaining established in a particular location. Andrew Fitzmaurice, former CEO of Nord Anglia observed, when considering the challenges of gaining government licenses "*You have to be, I think, a proven operator, like Nord Anglia, to obtain these licenses. So we think we're in a good position -obviously, in existing markets where we already have the licenses, and*

*also to convince people in new markets that we should be given licenses"* (Wall Street Journal, 2004) . The ability to leverage existing relationships with governments and corporations to support expansion plans may be a key to future financial success.

### Market internalization advantages

The undertaking of equity investment in wholly owned subsidies rather than non-equity ventures such as contracting out, franchising or licensing local firms offers TNCs a number of advantages. They have greater direct control over a) strategic and operational goal setting at the organizational and school level; b) monitoring and assurance of institutional quality and c) assessing and managing organizational risk. The spreading of risk through diversification is also common practice. Some TNCs such as Nord Anglia have broad portfolio of other educational interests including owning private schools within national systems, nursery schooling, educational consultancy services, and training military personnel. Nord Anglia has also looked to diversify into completely new markets such as healthcare (Wall Street Journal, 2004). It is interesting to consider whether strategies that involve diversifying into different sectors to take advantage of new business opportunities are indicative of a more pragmatic approach to business activity?

## The impact of Transnational Corporations on international school education

The success of TNCs in achieving growth coupled with their ambition and capacity for further growth emphasises the need to consider how they position their schools on an ideological/pragmatic continuum of international education. What sort of education will these TNCs be interested in offering? Additionally a further question to consider is whether the decisions about where schools are positioned on the continuum are made at the organizational level by TNC leadership or at institutional level by individual school leadership? A following reasons might suggest that TNCs are more likely to adopt a predominantly pragmatic interpretation of international school education based on 'globalist' perspectives rather than an ideologically focused 'internationalist' interpretation.

### Financial priorities

The need to meet profit targets could take priority over achieving educational goals particularly those that involve more resources. International education programmes with more 'internationalist' aims such as those offered by the International Baccalaureate have a reputation for being expensive to implement (Malik, 2013; Barker, 2013).

From a neoliberal perspective the profit motive should theoretically be a driver for improvements in quality as firms attempt to increase profitability by cutting back on waste and reducing bureaucracy. Striving for greater profitability could also result in greater innovation as corporations compete for customers. The ability and desire to attract funding through accessing capital and bond markets can allow schools to expand their infrastructure spending and operational budgets. However some educationalists argue that the priority of education is incongruent with the overall objectives of most corporate enterprises, that are usually more *"financially and commercially driven"* (Codrington, 2004). Levacic (cited in Ball 1993 p 7) observes that "A firm, whatever its organizational form is not run in the interest of its customers." Codrington's (ibid) comparison of corporate and educational *'best practice'* suggests the former focuses on "control, accountability and achievement of short-term goals", whilst the latter had a *"long- term focus of creating an inspiring and sustainable vision, based on a sound philosophy."* Ball (1993 p 7) argues that in the private educational sector the resultant *"disconnection of financial management and income maximisation from the production technology of education can result in principals of schools becoming primarily involved with the financial management and public relations".* Leadership distracted by the need to focus on commercial activities and getting, what might be referred to colloquially as 'bums on seats' may be problematic. School improvement literature clearly highlights the importance of effective educational leadership as being instrumental in ensuring schools are effective (Robinson et al, 2010; Hargreaves et al, 2007).

Evidence from the USA where for-profit corporations have been encouraged to take on the management of public schools suggests that such ventures are not without their problems in terms of balancing the commercial and educational interests. For example in 1992 Education Alternatives Inc. had the contract to run nine state schools in Baltimore appeared to make a range of compromises in order to control costs such as skimping on curriculum implementation, cutting back on expensive programmes such as those associated with special needs education, increasing class sizes, control teachers' pay by introducing performance related pay (Toch, 1996). Will TNCs exert pressure on their school leaders to meet the profits targets determined ultimately by the short-term demands of private equity firms, venture capitalists and shareholders, and risk sacrificing the quality of education being offered? For example will schools look to operate classes with larger numbers of students or cut expensive elements of the curriculum?

## The influence of parental choice

In a neoliberal political and economic climate where the commodification and commercialisation of education is becoming more accepted TNCs may also take a more pragmatic and 'globalist' approach

in order to pander to the needs of parents who want an instrumentalist education for their children and are increasingly seeing themselves, and being seen, as consumers of education. As customers, parents, at least in theory, have some degree of sovereignty in the market place as they can choose between education providers. Parental choice may exert a stronger influence on how schools position themselves within the market place Ball (1994 p 108) argues that "*the self-interest of the educational entrepreneurs is linked to the self-interest of parents wanting and able to pursue relative advantage in the educational market."* The educational priorities of international schools owned and run by TNCs may change in order to address the specific requirements of the transnational and, increasingly, the growing local elites who want their children to gain the necessary social and cultural capital, credentials and positional advantage for success and fulfilment in a globalized world. MacKenzie et al (2003) and Potter and Hayden's (2004) research on parental choice in international schools in Switzerland and Argentina respectively, both suggest that the priority of parents was for their children to be educated in, and become fluent in the English language, the lingua franca of the global business community. Although the factors influencing parental choice in international schools is not a well-researched field.

Educational systems that place greater emphasis on consumer or (parental) choice have been shown to demonstrate a propensity to focus on measurable indicators of quality outcomes rather than on the processes associated with achieving those outcomes (Ball, 1993). Consequently, student performance in external high stakes examinations and other tests may take priority in how schools approach their curriculum and instructional design processes. The backwash effects of high stakes examinations on the curriculum and teaching are well documented. For example, Buck (1988 p 17) concludes that *"there is a natural tendency for both teachers and students to tailor their classroom activities to the demands of the test, especially when the test is very important to the future of the students."* The inculcation of values and the development of less readily measurable learning outcomes associated with internationalism and global citizenship may therefore be sacrificed. It is interesting to note that in Dubai, a country where a significant proportion of its population are expatriate and served by a range of national and international schools, published school league tables that include international schools do not make any reference to the commitment of the schools to fostering internationalism (Dubai FAQs Information Guide, 2014).

### Conforming to corporate identities and branding requirements

A third potential reason for TNCs adopting a more pragmatic approach may exist because of the need to conform to the requirements of corporate marketing strategies. Creating and sustaining a successful brand image and the associated goodwill has been identified as being central to the

perception of organizational quality and establishing brand awareness and loyalty amongst prospective and existing parents and students is key to business success (United Nations, 1989). As each TNC attempts to improve its profitability or simply to survive in the market place, the need to comply with corporate identities and branding requirements may limit the capacity of individual schools to reconcile the conflicting interests of the 'globalist' and 'internationalist' perspectives in ways that vary from what the corporate image dictates.

Whilst being careful to warn against using differentiation theory developed for the business world uncritically to understand marketing behaviour in educational contexts, MacDonald (2007) identifies four broad areas in which international schools focus their differentiation strategy and establish a brand identity.

- Overt curriculum choices including national, international or mixed curriculum, student attainment, teaching quality.
- People e.g. demographics and qualifications of the teaching staff an d leaders.
- Hidden curriculum e.g. nature of interaction between teachers and students
- Others e.g. the emphasis placed on pastoral care.

Central to establishing a strong corporate identity is the decision about what educational programme or programmes to offer. When it comes to the curriculum TNCs can choose from a number of national and international programmes that are perceived to best target the needs of their particular clientele and consistent with their marketing strategy. Some opt for international curricula that are 'independent' of national systems such as those offered by the IB or the International Primary Curriculum. Whether this is for ideological or pragmatic reasons is open to debate. Certainly the mission and aims of the IB and its programmes refers to sets of values, understandings, skills and attitudes that are consistent with the notion of internationally mindedness (IBO, 2014). Although, Resnik (2009) argues that student outcomes associated with the attributes of the IB's Learner Profile, the set of attributes developed by the IB to articulate what it promotes as international mindedness are precisely those demanded of potential employees by the leading multinational businesses. It is perhaps not coincidental, then, that some TNC owned international schools adopt the IB Pre-university Diploma Programme as a means of enhancing their 'premium' brand.

In the case of Nord Anglia some of its schools have a distinct British focus, often marketed as British Schools following the English National Curriculum and offering English qualifications e.g. IGCSEs. Quite apart from the argument that this could represent a form of educational colonialism as these programmes are culturally specific and assumed, by implication, to be a preferential alternative to

local educational programmes, their adherence to a national educational programme often geared towards preparing students for external high stakes examinations and/or university admission suggests a more pragmatic approach. However TNCs do not necessarily limit their schools to following any one educational programme. Some Nord Anglia schools offer International Baccalaureate and Cambridge International Examinations programmes within the same school. In Nord Anglia schools in Switzerland and France programmes from the host countries are offered. (Nord Anglia Education, 2013). It could be argued that such a strategy is itself a pragmatic response to market demand.

GEMS Education also uses the programme as a means of differentiating the educational services their schools provide. GEMS founder and CEO Sunny Varkey likens its marketing strategy to that of an airline model (Buller, 2013). It operates a tiered system that includes *"State of the Art Premium Plus"* schools often offering the IB Diploma (charging the highest level of fees); *"Mid-Market plus"* schools offering Cambridge Overseas A Levels (charging less); and *"Mid-Market"* schools offering an Indian curriculum (charging the least) (Bunnell, 2011). Guttenplan (2013) argues that this differentiated model results in a kind of ethnic segregation-hardly a goal of an internationalist interpretation of international education. In response Varkey argues that different national groupings have different expectations about the nature of the facilities offered however all schools deliver high quality education as demonstrated by impressive student attainment and university entrance. By providing a range of schools at differing pricing points Varkey maintains they are offering greater choice to parents (Buller, 2013).

In arguing the importance of being an "*innovative and aggressive as a global brand"* (Buller, 2013) Varkey is clearly acknowledging the importance of establishing a recognizable, international corporate identity. But what exactly does a corporate identity mean or involve? Apart from the name, the use of consistent brand imagery, the particular programme(s) on offer and success in student attainment what would a student, parent, teacher, leader expect to see when they move from one TNC owned school to another. How will the school culture reflect the brand identify and vice a versa? How much variation in how the educational programmes are implemented will be permitted and to what extent are teachers encouraged to innovate and focus on setting and follow a more ideologically 'internationalist' agenda? As TNCs typically own multiple schools across different geographical contexts, will the requirement for compliance with a corporate identity limit the autonomy of individual schools to reconcile the ideological and the pragmatic? Will compliance with corporate identities governed primarily by commercial factors lead to, as Cambridge (2002) suggests, a *"predictability"* and *"an assurance that the products and services will be the same over*

*time and in all locales"?* Such a drift towards homogeneity with a distinct pragmatic focus may become increasingly prevalent amongst TNC owned schools.

### Extended TNC influence through greater market concentration

So far, the analysis is suggesting that in terms of where schools are positioned on an ideological /pragmatic continuum TNC schools may be more inclined to offer a more pragmatic 'globalist' interpretation of international education and focusi on meeting their students demand for achieving global qualifications. These pressures may be exacerbated as the international school market in which the TNCs operate become increasingly concentrated with fewer firms dominating. Currently the data from Table A and the ISC database (ISCG, 2013) indicates that the degree of concentration in the international school sector is relatively low. However with ambitious growth plans envisaged by some TNCs (Buller, 2013) their numbers and consequential impact are likely to grow. If GEMS Education is successful in achieving its goal of 5000 schools and educating 5 million children by 2025 (Woodward, 2005) the international school market could become far more concentrated and afford the leading TNC providers greater degrees of influence in the market place as both providers of international schooling and purchasers of educational resources and services. It is in the nature of market development that new markets have numerous competitors, but as time goes by competition sorts out *"the winners and losers"* and eventually culminate in *"a few players left standing and in control of most of the market*" (MacDonald, 2006).

Large organizations can extend and sustain their influence of markets by erecting barriers that restrict the entry of new competitors (Sloman, 2000). Possession of economies of scale, strong brand loyalty, trusted relationships with governments regarding licensing arrangements and preferential contractual agreements with the transnational businesses employing the parents of international school students are all ways in which competition can be limited. Larger more powerful TNCs may be able to exert a greater influence on education programme providers, professional development providers and publishing houses in ways that are consistent with the TNC's own philosophical and strategic ends. For example, organizations such as the IB, who are themselves, despite their not-for profit status, responsive to market forces may feel financial pressure to reform their own policies and refine some of the more ideological elements of its programmes in favour of more pragmatic policy measures e.g. the inclusion of more external assessment and certification.

The increasing influence of TNC activity may also extend to the respective labour markets for school leaders and teachers. By exploiting their transnational status and ability to recruit in different national labour markets and by offering attractive salaries and working conditions TNCs can attract high quality educators away from national education systems and other international schools. This

could create or worsen shortages within national state education systems and attract teachers from those international schools that offer a more 'internationalist' approach to education.

Torres (2002) assertion that globalization places limits on state autonomy and national sovereignty is highly relevant in the context of TNC involvement in the labour market. Due to their transnational nature the loyalty and accountability of TNCs to individual countries and governments is perhaps limited. Giroux (2002 p 430) argues that *"unchecked by traditional forms of state power and removed from any sense of place-based allegiance, neoliberal capitalism appears more detached than ever from traditional forms of political power and ethical consideration."* Consequently TNCs may lack the motivation to consider the effect they have on local labour markets or any corporate responsibility to national education systems. Given the lack of TNC accountability to national governments it will be interesting to see whether governments react to persistent outflows of high quality teachers from state education systems. Will governments continue to be prepared to fund TNCs freeriding on national teacher education programmes? Will governments, aware of the high costs of training teachers and the growing pressures to control their spending require TNC activity to be regulated through international trade agreements in educational services? Will they, at some point attempt to restrict the geographical mobility on locally employed educators? International schools, some of which are committed to more ideological interpretations of international education may also risk losing teachers to schools operated by TNCs. It is interesting to consider whether educators who were previously committed to values associated with internationalism and global citizenship will be prepared to compromise their principles for the financial benefits offered by TNCs. Will the motivations of international school educators as a body of professionals change over time and demonstrate less of a commitment to fostering ideological interpretations of international education? Will it therefore be inevitable that international schools increasingly move towards the 'globalist' end of the continuum of international school education?

## Conclusion

The international school sector is changing as commercial for-profit transnational corporations become established. There are many powerful forces at work in the pursuit of profit and commercial success that will affect how the reconciliation between the ideological and pragmatic interpretations of international education within schools play out. The need to satisfy the demands of financial backers, from aspirational parents and students wanting globally recognized qualifications and skill sets, and from corporate branding requirements may result in the leadership of these TNCs to take stronger pragmatic, market orientated positions and make compromises on the 'internationalist' interpretations of international education. Will the international school market, increasingly

dominated by TNCs, experience a 'crowding out' of ideas, dialogues, literature, programmes, pedagogies, assessments, professional development and institutions associated with a more ideologically 'internationalist' interpretation of international education. Overtime will the international school teaching community become increasingly divorced from its ideological roots and values and be driven by the needs to perform and survive in an aggressive global market place? Will those ideological interpretations of international education that do manage to continue be confined to small enclaves of international school increasingly seen by the majority as idiosyncratic and anachronistic. Or will a niche market specialising in 'internationalist' interpretations of international school education develop and flourish?

But does it really matter if there is a movement along the continuum of international school education from the ideologically 'internationalist' to the more pragmatically 'globalist'? Does it matter that private international schools, ostensibly serving a wealthy transnational or local elite, become concentrated in the hands of for-profit global corporations and the education they offer become less ideologically focused? It is after all a rather small market, albeit widely distributed. This paper puts forward five arguments why it might.

Firstly, a central goal of international school education in its original conceptualisation was about educating young people to create a better and more peaceful world (Hill, 2012). It is argued that this is as relevant now as it ever was, when those innovative educators in the early international schools broke the mould of the traditional model of education serving national interests. The geopolitical tensions that were manifest prior to, during and post the Second World War, and the Cold War have been replaced by new tensions between those of Judo Christian and Islamic traditions fuelled by what His Highness the Aga Khan refers to as the *"clash of ignorance"* (Speigel, 2006). The need for international schools to build the capacities and capabilities for young people to understand, relish, accept and learn from those of different world views and cultures is as much of an imperative now as it has been since the founding of the International School of Geneva in 1924. The need for an education that enables young people to wrestle with global issues such poverty, disease, climate change, population migration and reach resolutions that require them to shift their thinking and raise global interests over and above their own and their country's national interests still exists.

Secondly, whether you agree or not with the Lauder and Brown (2011) and Steketee's (2004) analysis that international schools play an instrumental role in educating a transnational capitalist class that perpetuates a system of neoliberal values that is inherently unfair, the education they provide does target those who are likely, because of their socioeconomic background or their direct involvement in multinational corporations, agencies and governance, to wield a disproportionate amount of influence and power. In the future many alumni from international schools may become

corporate, political, and community leaders at national or international levels. It is therefore essential that the education they receive encourages them to acknowledge their responsibility for furthering the interests of all, including those members of Robinson's (2004) second and third tiers of global citizens, the marginalized and disenfranchised. The values and attitudes associated with an ideological interpretation based on such things as internationalism, international mindedness, stewardship of the planet, compassion and action towards the disadvantaged who are not part of any transnational class must be an integral part of the education that the privileged receive if the idea of a peaceful and better world is a realistic aspiration.

Thirdly, international schools acting largely independently of government and commercial pressures have been and can continue to be a *"education laboratory in curricula and examinations"* which could have a positive and creative influence on national systems (Renaud, 1974). They provide places where new ideas gleaned and fused from different cultural contexts and perspectives are conceptualised and put into practice, where the act of interpreting what international education means in different international school contexts results in creative tensions that lead to new ideas, ways of thinking and educational practices that eventually become mainstream in national systems.

Fourthly, International school education should not be seen as operating independently of national education provision. International schools must play a responsible role as part of a sustainable global education system. Sustainability is not simply about endurance it is also about ensuring endeavours *"can be developed without compromising the development of others in the surrounding environment, now and in the future"* (Hargreaves& Fink, 2003 p32). The impact on national state education systems that serve the poorer elements of populations, the second and third tiers of Robinson's typology of global citizens (2004), the marginalized and dispossessed cannot be ignored. The demand for teachers from powerful private education conglomerates may lead to the leaching out of the brightest and best from the national state systems further disadvantaging the already marginalized. The opportunity cost of a teacher working in a TNC is disproportionately high.

Finally, the proliferation of international schools owned by commercial organization offering western models of education to overseas local populations as alternatives to national systems in an uncritical way represents a neo-colonial position. Ball (2009 95) makes the point that in the *"development of basic educational provision in many developing societies, private involvement is built into the systems from the start".* In the case of international schools Ball argues that "*the private sector is the instrument of a form of re-colonialisation".* The political, social and cultural implications and legitimacy of such activity are all areas for further research and debate.

It is only relatively recently that the *"well-kept secret"* of international school education (Hayden and Thompson, 2008) is becoming better known and more influential, not only within the comparatively

small international school sector, but also within national systems. The 'freeing up' of educational markets and the prevalence of neoliberalist attitudes, arguably a feature of rapid globalization, is changing the face of international school education. The market is becoming more complex as both providers and consumers recognize the potential benefits. However, as TNCs enter the market place a degree of order is emerging with as yet undetermined implications. The development of a more critical literature in the current millennium from the likes of Hayden and Thompson, Bunnell, Bates and Cambridge have moved the debate forward drawing attention to the marketization of the sector and the role that equity and non-equity ventures play in owning and running international schools. However there is still more research needed into the effects of this growing area of commercial activity.

The paper suggests that as a consequence of the emergence of TNCs operated international schools the character of schools is changing. In private education pragmatic market orientated considerations, by necessity, will always be a factor however the need to avoid being wholly market driven and to combine pragmatism with an ideology associated with internationalism and global citizenship development is essential. The dilution of this ideology and its replacement with one associated with the promotion of neoliberal values is one that many would find problematic and at odds with those early ambitions of *"imbuing students with an earnest belief in internationalism".*

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