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British elite private schools and their overseas branches: unexpected actors in the global education industry.

Abstract

Our paper examines the opening of branches overseas ('satellite colleges') by elite private schools mainly located in England ('founding colleges'), largely in emerging economies of the Middle East and South East Asia. We trace the development of these 'satellite colleges' over three successive waves of growth, from opportunistic venturing in Thailand in the late-1990s to their recent rapid growth in numbers in a phase characterized by the market entry of new actors and geographic diversification. We argue that the emergence of these schools occurs in line with the continued intensification and diversification of the GEI. This implies a significant shift in the modes of legitimation on which British elite schools typically rely.

Introduction

As recently noted in this journal, a ‘notable development in contemporary education is the rapid growth of International Schooling throughout much of the world’ (Dvir, Shields, and Yemini, 2018 p.455), yet there is a paucity of research on the actors involved, and the diversity of institutions that are now evolving within local education markets. This paper charts an under-reported aspect of this phenomenon, the commercialization, exportation, and quasi-replication of the elite ‘British-style’ private school. This is epitomized in the main by England’s prestigious ‘Public Schools’ delivering to foreign lands, including British ex-colonies, an essence of ‘Englishness’ in the form of franchised ‘satellite colleges’ (Bunnell, 2008) that charge in some cases five times the average annual income of local residents (Ge, 2017). This phenomenon is currently experiencing an unprecedented growth: the number of satellites has grown from 37 in 2014 to 73 in 2019 with more schools due to open the following years, possibly bringing their number to over 100 by 2022.

This financially motivated and seemingly low-cost/high-return globalization of education phenomenon was pioneered in 1997 in Thailand by Dulwich College, quickly followed by Harrow in 1998. Significantly, both are among the most exclusive English Public Schools, well-linked to Britain’s ‘ruling class’ (Walford, 1986 p.1), and recently described as ‘Engines of Privilege’ (Kynaston and Green, 2019). A ‘second wave’ emerged in the early 2010s, driven particularly by the pragmatic need for elite private schools in England to maintain their threatened charity status through creating innovative alternative revenue streams that could fund scholarships and bursaries back home (Bunnell, 2008). This remains a key motive, as noted by Bray (2015) when making the following comment:

‘A partner campus also makes sense for the parent school, as fee income is used to benefit bursary schemes at home and maintain tuition costs at acceptable levels.’

This desire to pragmatically seek out a reliable, low-cost alternative revenue stream ‘back home’ is still driving the supply but does not on its own explain the unprecedented growth of activity characterizing the current ‘third wave’. Further, a number of new school openings is already planned (Phillips, 2017), pointing towards a possible ‘fourth wave’ emerging in the near future.

Despite its current rapid upward growth slope, and the involvement of ‘icons of elite education’ (Bow, 2017), the ‘satellite college model’ has attracted very little attention beyond the British-based trade press, as well as a single piece of sustained analysis by Bunnell (2008) when the phenomenon was in its infancy.¹ While in higher education, the ‘International Branch Campus’ (IBC) phenomenon is relatively well researched (e.g. Kosmützky, 2018; Liu and Lin, 2017), its school-level counterpart is still largely ignored by academic comment or research, and remains almost entirely under-theorized.

This paper is based on data collated from publicly available data sources including the trade press, school websites, and industry reports. It charts and analyses the emergence of the ‘satellite college model’ as part of the trend of marketization and globalization of education. More specifically, we locate this phenomenon at the intersection of two significant trends typically analyzed separately. On the one hand, there is the enduring appeal of an exclusive, British ‘elite’ education for the aspiring middle classes worldwide (Kenway and McCarthy, 2014; Ayling 2019; Brooks and Waters, 2015), and on the other, there is the remarkable expansion of the ‘global education industry’ (GEI) (Ball, 2012; Parreira do Amaral et al., 2019; Verger et al., 2016b).

¹ For example the British Council published a 18-page report on the growth drivers (2015). The HMC Magazine occasionally publishes stories from school principals involved in setting up satellite schools.

Of particular interest is the potential tension at the intersection of these trends. While the growth of the GEI is largely driven by the spread of standardised, low-quality products distributed on a large scale (Hogan, 2018; Verger et al., 2016a; Pizzaro and Quirke, 2017), the literature on elite schooling points instead to the cultivation of rarity and distinction and to the dominant position of unique, long-established institutions historically associated with the production of elites (Courtois, 2018; Gaztambide-Fernandez, 2009; Maxwell and Aggleton, 2016).

The fact that English elite schools, whose symbolic power arguably depends on their exclusivity, take the risk of diluting their ‘brand’, complicates our understanding of elite schools as exclusive, exclusionary and also as white in essence (Courtois, 2016; Ayling, 2019), uncovering corporate behaviours more typically associated with the GEI. We argue that their growth reflects an intensification and diversification of the GEI that is aided by the UK government and marks a significant change in the principles of legitimation that characterize the elite private school sector: from elitist keepers of aristocratic traditions (Wakeford, 1969), to global businesses selling ‘Englishness’ abroad in line with the corporate branding of the nation.

The analyses presented here builds on the aforementioned earlier work by Bunnell (2008) which had observed the phenomenon of elite British private schools opening ‘satellite colleges’ at a very early stage. At that time, over a decade ago, the phenomenon was in its infancy, with only seven branches established, predominantly in Thailand, and it was not clear whether it was a trend that would take off. The growth of the franchise model in mainland-China was certainly not anticipated, nor was the appeal of the model to lower-status British private schools. Like the early universities who established branch campuses in the 1950s, it could have been the case in 2008 that the pioneer schools, led by Dulwich and Harrow, might have failed to materialize into any significant global phenomenon. It has since emerged that

there has been a clear trend and huge growth, as well as significant diversification, which warrants a deeper and much more considered critical analysis. Indeed, the emerging scale of the phenomenon brings into sharp relief the contradiction between the logics of eliteness (rarity, uniqueness, history) and that of the GEI (large numbers, standardization). In this context, the growth since 2008 is largely ‘unexpected’.

We begin our analysis by introducing trends that are relevant to the phenomenon under study, namely the growth of the GEI, and we also begin to consider the parallel development of the Higher Education IBCs. Both these trends were largely absent from Bunnell’s (2008) analysis. Then, we chart the development of ‘satellite colleges’ and describe the ‘three-wave model’ that underpins this paper, thus developing and reinforcing Bunnell’s (2008) earlier ‘two waves model’. We then focus more specifically on the characteristics of the ‘third wave’ and interpret its emergence in the context of the GEI. Finally, we will add some suggestions for further developing the topic.

The ‘global education industry’ and the marketization of ‘English-style’ education

The marketization of education is a global phenomenon. National governments and supra-national agencies have reframed the relationship between families and education, reshaping it as a consumer choice rather than a basic right. This has paved the way for the rise of education business as a powerful force, not only in terms of its global reach and its multiple forms but also as an active agent in consultancy and ultimately, in policymaking (Ball, 2011, 2012).

Global providers of private education and related services (e.g. school improvement consultancy) reach deep into national markets, providing both low-fee and high-fee educational

services, catering for middle-class families as well as stepping in where states have failed to provide basic public education to populations (Verger et al., 2016a). In conjunction with the desires of the middle classes for educational advantage, this has led to a dramatic increase in the provision of diverse forms of private education across the globe.

English-medium schools are particularly popular products of the GEI, in particular due to the growing demand for English-medium education in China and elsewhere (Wright and Lee, 2014 p.151). In addition, aspiring families particularly value an ‘English style’ of schooling (Brooks and Water, 2015; Gardner-McTaggart, 2018). The appeal of a ‘British education’ influences the way schools present themselves as this ‘Britishness’ is very much at the core of their imagery and marketing strategy (Brooks and Waters, 2015).

While the marketization of education is not a new phenomenon, its recent acceleration is remarkable. In 2016 it was estimated that the global education sector was worth 4.3 trillion and that its value was set to continue growing (Verger et al., 2016). As global finance capitalist firms invest in what they see rightly as a high-profit sector, complex networks of influence have developed with the emergence of intermediaries actors (law firms, accountancy firms, consultants, lobbyists, recruiters) (Verger et al., 2016a; Komljenovic, 2017).

Their impact on national education systems is significant. Traditional providers of private education now face increasing competition from new providers active in the GEI. Where the education market is deregulated, this may drive traditional providers of private education, as well as the state education sector, to adopt comparable corporate behaviours (Pizzaro and Quirke, 2017). The GEI shapes desires by developing and packaging educational products in a way that frames certain skills and experiences as desirable and achievable (Shin, 2016); this also impacts and potentially influences other providers. However, and while the educational products offered by the GEI tend to be stratified between low and high-income

target groups (Ridge, Kippel and Sami, 2016), the traditional clientele of elite private schools is generally not considered as a target of the GEI.

Thus, in wealthier countries, the most typical product of the GEI is the non-elite private school. Rarely do private providers attempt to compete on the elite education market, for they may lack the networks, symbolic capital, or simply the finances to build suitably prestigious campuses; instead, their strategy is to locate themselves as a niche product, with a focus on ‘care’ for example (Pizzaro and Quirke, 2017), or on ‘efficacy’ as brand identity in the case of edubusiness giant Pearsons (Riep, 2019). Further and as shown in the case of India, new actors have typically found it difficult to unsettle the domination of the well-established historical schools as the latter have a broader repertoire of eliteness to draw on (Rizvi, 2014). Thus, typically, according to the literature, GEI actors would not compete with traditional elite schools and would not necessarily attempt to use their vocabulary.

In his 2008 article, Bunnell had identified the phenomenon – as said, then in its infancy – as a manifestation of ‘hyper capitalism’, namely the commodification of the immaterial and more broadly of that which did not seem commodifiable. This may stem from the scholarly consensus on the distinctiveness of elite schools. Such schools constitute a small subset of the private education sector and are characterized by specific features, among which are: exclusiveness and high selectivity; prestigious location and distinctive physical character; historical association with the formation of elites; membership of the prestigious HMC (Headmasters’ and Headmistresses’ Conference, a grouping of 283 elite, primarily UK based private schools); and a wealthy, predominantly white, clientele (Gaztambide-Fernandez, 2009). Excellence, tradition and uniqueness are at the core of their promotional strategies and legitimation principles (Prosser, 2018). Thus, increasing capacity, by means of extending or duplicating a campus, is at odds with the principle of ‘uniqueness’ and exclusiveness at the core of the identity of elite schools (Maxwell and Aggleton, 2016).

In our view, the greater developed literature on IBCs potentially sheds light on this phenomenon and its exponential growth. At first glance, there appears some convergence between the overseas expansion of British universities and the establishment of overseas branches by elite British private schools which we examine in our paper. This distinctive form of education provision has been defined as “an entity that is owned, at least in part, by a foreign education provider; and provides an entire academic program, substantially on site, leading to a degree awarded by the foreign education provider” (Garrett, 2017, p. 7).

The IBCs first emerged in the 1950s but have witnessed an exponential growth since the late 1990s (Escriva-Beltran et al. 2019). The growth accelerated from the establishment of less than five per year in the mid-1990s to around 20 per year from 2010 onwards. In January 2017 there were around 249 such university branch campuses. The same analyses found a mixed set of ownership structures, with around a third of branch campuses wholly owned by the home campus and the rest taking the form of a partnership model with Government or local private providers. The desire to secure an additional revenue stream has been put forward as a key rationale for their establishment, likely to be induced and encouraged by Government drives to export educational goods (Wilkins and Huisman, 2012; Escriva-Beltran et al., 2019).

Significantly, Kosmutzky (2018) identified several (four) waves of IBCs in line with different stages in the expansion of the global higher education market. Thus, parallels might well be drawn here between universities and elite private schools undertaking what is ostensibly a similar institutional strategy. The key distinction between the two, however, could be the fact that universities are offering a more inherently institutionalised credential, that carries a particular ‘status’ which schools do not carry (these schools instead largely deliver the branded International Baccalaureate Diploma Programme, or the Cambridge/Edexcel Advanced Levels). However, that said, they both likely promote their ‘brand’ and associated status of a British educational institution and British credential.

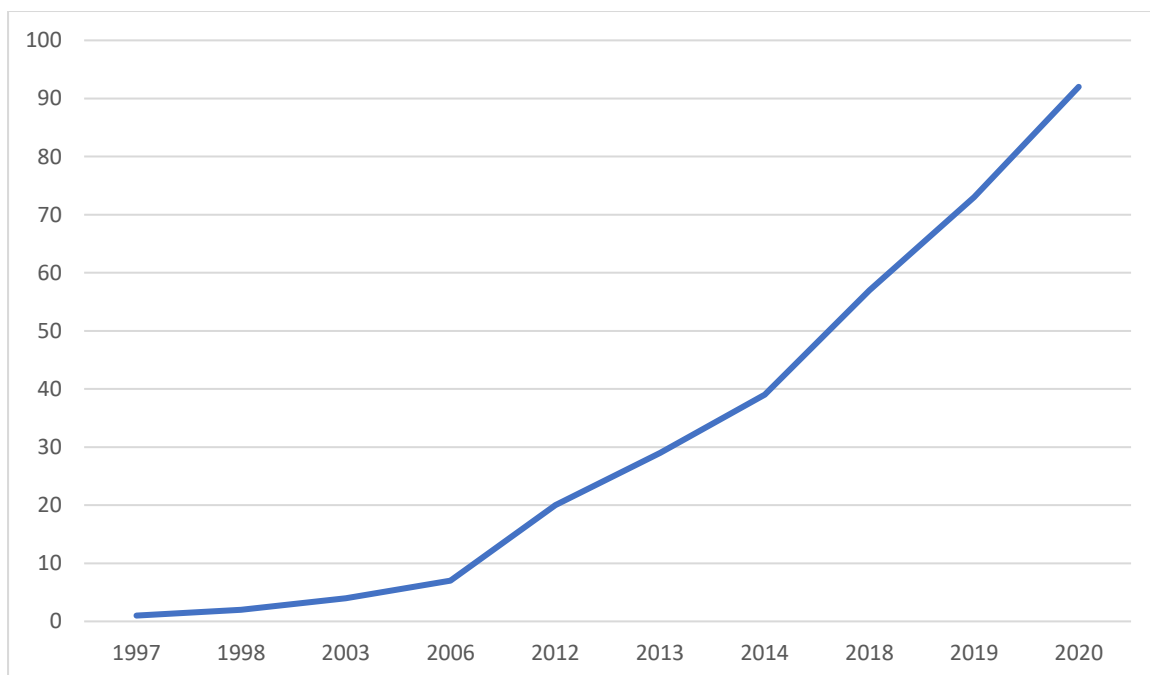
As noted by Wilkins and Huisman (2012), the growth of IBCs is interesting not least because they represent a change in the typical decision-making of universities, in terms of the rate of growth and the concomitant financial and reputational risk associated with such decisions. We argue here that in many ways the same is true for British elite private schools, in terms of the reputational risk, but also more importantly the legitimacy of their ‘elite’ status.

The ‘satellite college’ model: growth and change over time

The growth of the ‘model’

We will now use data gathered from British popular press reports since 1997 to reveal the growth pattern until 2020, as shown in Figure 1 below.

Figure 1: The growth of the number of ‘Satellite Colleges’ 1997-2020



It can be seen from Figure 1 above that the ‘model’ has had three distinct growth ‘waves’. It was relatively slow to take-off, reaching just seven branches by 2006. A ‘second wave’ of activity, already noted and initially discussed by Bunnell (2008), meant that by 2012 there were

20. By 2014 there were 37. By 2019, the ‘model’ had doubled in size again, and involved 73 overseas branches, educating 45,000 children, with an annual fee income of £1bn (Jack, 2019). The year 2018 alone saw a 25% rise in the total number (Turner, 2018). A further 19 branches are expected by 2020 when it is anticipated (Zhuo, 2018) that as many as half of the-then 92 branches will be in mainland-China, in emerging cosmopolitan cities such as Zhuhai, Xianen, and Chengdu.

The current growth spurt, evident in Figure 1 above as occurring since about 2013-2014, forms part of a discernable ‘third wave’ of activity, which we now identify as beginning about the time of the London-situated Olympic Games, held in Summer 2012.

Looking forward, the field looks set for at least one more ‘wave’ of enormous growth. It was reported in May 2019 that the UK Department for International Trade is aware of at least 120 overseas projects being considered by British-based private schools (Jack, 2019).

The main ‘players’

Table 1 below shows the main ‘players’ in 2019, and the number and location of branches within their chains.

Table 1: The main players in 2019 and the location of their overseas branches

<i>‘Founding College’</i>	<i>Number of overseas branches (2019)</i>	<i>Location of overseas branches</i>
Dulwich College	9 (Dulwich College International)	Seoul, Singapore, Yangon (Myanmar; two campuses). Beijing, Suzhou (x2), Shanghai (x2), and Zhuhai (all three cities in China).

Malvern College	4 (Malvern College International)	Cairo, Hong Kong, Quindao, and Chengdu (both in China).
Hurtwood House	5 (HD Schools)	Beijing, Ningbo (x2), Shanghai, and Qingdao.
Wellington College	6 (Wellington Family of Schools)	Hangzhou (x2), Shanghai (x2), and Tianjin (all three cities in China). Bangkok.
Brighton College	4 (Brighton College International Schools)	Abu Dhabi, Al Ain, Bangkok, Dubai.
Harrow School	4 (Harrow Foundation Family)	Bangkok, Beijing, Hong Kong, Shanghai.

Dulwich continues to be the forerunner, and through its ‘Dulwich International College’ subsidiary by 2019 it operated 9 overseas ventures, educating 9,000 children across seven cities in South East Asia including six in mainland-China, and one branch with two campuses in Myanmar (in Yangon, and Star City). The six founding colleges mentioned above had in 2019 a combined total of 32 overseas branches, revealing a degree of concentration that is not self-evident when looking at raw growth figures. Moreover, it seems to also reveal that the ‘multi-branch’ players have built up, over time, their own sub-infrastructure whilst they are now enjoying the financial benefits that come with positive economies of scale (Jack, 2019). Each has a distinct subsidiary body that oversees the projects (e.g. Brighton College International Schools). As can also be seen, mainland-China now firmly forms the epicenter of activity.

The three waves explained

The ‘first wave’ of growth

The model had rather modest and deliberately cautious beginnings (Bunnell, 2008). It was discretely pioneered in 1997 in Thailand (Phuket), by south London’s independent boys’ boarding school Dulwich College through what was then an original and potentially risky franchise business model. The other chief pioneer, North London’s Harrow School, swiftly followed suit, in Bangkok, the following year. Bromsgrove followed in 2002 and Shrewsbury in 2003, all initially in the same nation-state, Thailand. Dulwich pulled out of the initial 1997 Thailand (Phuket) venture in 2005, meaning that Harrow Bangkok is now the oldest established, with over 20 years of *continuous* existence. This first wave of activity can be characterised as opportunistic. The Master of Dulwich was reported (Spencer, 2005) as claiming this involvement had occurred ‘by chance’. It should be noted that Thailand had a well-established alumni network and a solid middle-class market, making this venture relatively low risk.

The timing of this development, in the late 1990s, coincided neatly with the commodification of education, that accelerated in 1995 following the successful ‘Uruguay Round’ of World Trade Organization (WTO) talks that had culminated in the General Agreement on Trade in Services (GATS). The GATS was in effect a ‘game changer’ that aimed at encouraging and legitimizing the commercialization of education as a tradable service (Verger and Robertson, 2012). Thus, the ‘first wave’ can be further viewed as a response to the emergent opportunity to export and sell educational experience and heritage overseas, as a form of ‘post-global’ (Kapferer, 2005) brand.

The ‘first wave’ involved just four founding colleges, all members of the prestigious HMC. Further, Dulwich is also a member of the 12-strong ‘Eton Group’, who operate within

the HMC bloc. Harrow and Shrewsbury are members of the 18-strong ‘Rugby Group’. These latter two schools were one of seven charity-status English boys’ boarding schools who in 1868 were instigated in the *Public Schools Act*. Table 2 below reveals their historical elite status.

Table 2: The status of the pioneering four ‘Founding Colleges’

<i>Founding College</i>	<i>Origins</i>	<i>Status</i>
Dulwich College	Founded in 1619 by Edward Alleyn, an Elizabethan actor	Member of the ‘Eton Group’, an association of 12 HMC members.
Harrow School	Founded in 1572 by John Lyon, under a Royal Charter of Elizabeth	<i>One of the original seven ‘Public Schools’ as defined by the Public Schools Act 1868, and one of the ‘Great Nine’ identified by the Clarendon Commission of 1861. Member of the ‘Rugby Group’, an association of 12 HMC members.</i>
Shrewsbury School	Founded by Edward VI, in 1552	<i>Same as Harrow above.</i>
Bromsgrove School	Founded in 1553.	One of the 14 founding members of the HMC, in 1869.

One can observe that the first schools involved are very prestigious HMC-member institutions with powerful brands, and histories stretching back at least 300 years. Moreover, Harrow, and Shrewsbury are also members of the extremely prestigious Clarendon Commission (alongside Eton, Rugby, Charterhouse, Merchants Taylors, St. Paul’s, and Westminster), who educate just 0.15% of the school population, and whose alumni are ‘94 times more likely to reach the British

elite than are those who attended any other school’ (Reeves et al, 2017). For its part, Bromsgrove stands out as a founding member of the HMC (one of 14).

The ‘second wave’ of growth

There was speculation of 13 elite private HMC schools in England engaged in talks with foreign backers (Savill, 1997). In the end, just seven schools were involved by 2011. We know that Winchester considered an early venture (Sampson, 2004), whilst Eton, Stowe, and Westminster turned down early offers (Boone, 2004). However, between 2006 and 2012, the number of ‘Satellite colleges’ rose to 20.

The catalyst for the sudden, yet timid, growth after 2006 was deemed by Bunnell (2008) to be the pressure faced by elite private schools in England to ‘prove’ their charity status, as pronounced by the British (Labour party) Government’s *2006 Charities Act*. Subsequently, some schools began to use the satellite college model as a deliberate and convenient means of generating a revenue stream to finance bursaries and scholarships back home, in the founding college. In 2019, this remains a key motive, to which can be added new financial threats. It was reported in 2018 that the British Government was looking into levying VAT (‘sales tax’) at standard 20% on private school fees, which are currently non-taxed in accordance with the charity-status (Henshaw, 2018).

The model moved into the Middle East when Repton School Dubai (becoming the region’s first Boarding School) appeared in 2007. Haileybury (in England) opened a branch in Almaty in 2008, and Sherborne opened a branch in Doha in 2009. Wellington College opened a branch in Tianjin in 2011, beginning the first of their China-based operations. All of these schools are either Rugby, or Eton Group members.

The ‘third wave’ of growth

The more recent ‘third wave’ of growth is especially intensive, with an acceleration in the number of schools opening and planned by both existing players and new entrants to the market. Coinciding with the London Olympics of 2012 and the associated branding of the nation, a phenomenon termed ‘nation branding’ (Dinnie, 2008) and ‘place branding’ (Hann and Rowley, 2008), it seems characteristic of an acceleration in the opportunistic growth of the GEI.

Brighton College opened a branch in Abu Dhabi in 2011, whilst much activity began to appear after 2012. From 20 branches in 2012, there were 29 schools in 2013, and 39 in 2014 (Harper, 2014). By 2018 there were 47 satellite colleges, including 19 in China, educating 32,000 children (according to Independent Schools Council census data from 2018). This growth trend is clear in Figure 1 above.

Almost every educational hub in South East Asia now hosts a ‘satellite college’ acting as an ‘anchor school’ e.g. Sherborne in Education City (Doha) in 2009; North London Collegiate School in Global Education City on Jeju Island Korea in 2011; Marlborough College in EduCity (Iskandar) in Malaysia, in 2012; and Epsom College in Bandar, Malaysia, in 2013. In this context, the model became clearly much less opportunistic, and more competitively strategic.

The ‘third wave’ has seen non-England-based elite private schools being involved. Canada’s Branksome Hall has a branch on Jeju Island. New York’s Dwight School has ‘satellite colleges’ in London, China (Qibao), Dubai and Seoul. Haileybury (Melbourne) has had a branch near Beijing since 2013. At least four elite Scottish private schools will enter the market. Merchiston Castle plans a series of schools in China starting in Shenzhen. Two other

schools in Edinburgh, Mary Erskine and Stewart's Melville have also agreed on branches in Shenzhen. Fettes College intends to open a replica branch in Guangzhou in 2020.

Nonetheless, the model remains very much an English 'Public School' phenomenon. The prestigious Clarendon-member Rugby School decided to enter the fray, in Thailand in 2018. A major post-colonial development emerged when King's College Taunton opened a branch near Delhi in 2016 to become the first 'satellite college' in India. Repton opened a school in Bangalore in 2018. Dulwich moved into Myanmar (Burma), another ex-British Colony, in 2016. The Dulwich College Yangon (Pun Hlaing) campus was co-joined by one in Thanlyin Star City in 2017. Christ College Brecon (in Wales) plans to open a branch named King Henry VIII College in Cyberjaya, Malaysia. North London Collegiate School, intends a second branch, in Singapore.

Finally, and against the geographical run of play, King's College St. Michaels, in Worcestershire, plans to open a 'post-Brexit' branch in Frankfurt, whilst Malvern College had opened a branch in Cairo (so far, the sole venture into Africa) in 2016.

The third wave: expansion, diversification, normalisation

Expansion into new spaces

The changing geography of the 'model' is important to consider. It was earlier commented that the phenomenon 'reveals much about the geography of the global elite and the emerging beneficiaries of the current phase of globalisation' (Bunnell, 2008 p.389). The movement into 'Tier-2 city' territory became evident when Malvern had opened a branch in Qingdao. This was a discernible move beyond the boundaries of the more normal capital or established cosmopolitan cities such as Bangkok, Doha, Hong Kong, or Mumbai. We can identify China's 'Tier-1' cities since in 2010, the 'National Central City' plan placed focus on five 'major' cities

(Beijing, Chongqing, Guangzhou, Shanghai, and Tianjin). Chengdu was added to the listing in 2016, followed by Wuhan, and Zhengzhou.

The ‘Tier-2 cities’, on the other hand, ‘are eager to attract foreign investment and quicker to approve new International Schools than Beijing or Shanghai’ (Chiu, 2015). Another branch of Bromsgrove School opened in Shenzhen in 2016. In 2018, comment was being made (Zhuo, 2018) that China’s ‘second-tier’ cities are now the nexus of activity. Further examples include King's College School (KCS), in Wimbledon, London, opening a branch in Wuxi Taihu New City, near Shanghai in September 2018 and intends to have another three branches in China. Significantly, it was reported (Roberts, 2015) that KCS’s venture in Wuxi will ‘double the number of bursaries available for London students.’, pointing to the financial underpinning of the initiative, characteristic of the behaviour of actors in the GEI. Wycombe Abbey opened a branch in Hangzhou in 2018, and will open a second branch in China, one of five planned, in Zhuhai in 2019.

The movement into ‘Tier-2 city’ territory can now be seen elsewhere, beyond mainland China. A third ‘Clarendon Group’ member, Rugby School, finally entered the market in 2018 and opened a branch (ages 2-18, co-ed, boarding, A-Levels) in Chonburi, Thailand, about 110km from Bangkok. In 2016, an overseas branch of King’s College Taunton (called ‘Kings College India’) opened in Rohtak, northwest of Delhi. In 2018, Repton School opened a branch in Bengaluru. What was significant about this development, apart from being a surprising post-Colonial development, gain, was the deliberate movement into new types of territory, away from the epicentres of ‘global cities’ and into less wealthy and less cosmopolitan areas. The opening of a branch of Dulwich College Yangon in Star City in Myanmar (formerly Burma) in 2018 was a similar type of development.

Mainland China, and the 10 nations comprising the English-speaking trading-bloc, the Association of South-East Asian Nations (ASEAN) now help form the main geographical backdrop offering clues as to both the emergent parental demand, and the localized educational policy-making. It is becoming apparent that the demand from aspiring ‘middle class’ parents especially in Asia is partly driven by an opportunity to join an exclusive network (Machin, 2017). This is certainly evident, more generally, in the case of ‘international schools’. It is said in the context of Myanmar that ‘For many parents the chance to rub shoulders with an international elite is another major draw’ (Rose, 2017). One local parent in Myanmar was quoted by Rose (2017) as saying about Dulwich College Yangon that ‘it’s the prestige associated with these schools that make them worth paying for’. Further comment, specifically about China, says that:

‘Unsurprisingly, many of China’s wealthy middle class are keen to enrol their children in International Schools, it is a status symbol as much as a pathway for their children to study overseas’ (Chiu, 2015).

General comment in the trade press has asserted that:

‘Another advantage of international schooling is the development of social capital in the form of friendships and networks with students from affluent and often influential families’ (Maxwell, 2015).

Following from this, the argument of a demand-driven phenomenon could help explain this growth, and in particular how the model gained entry into ‘Tier-2 cities’, especially in mainland-China, where an emergent and growing middle-class currently reside and can be attracted to an innovative and relatively exclusive ‘English’ educational experience.

The involvement of new players

It was previously noted that lesser-known private schools might enter the market (Bunnell, 2008, p. 389). Indeed, while the second wave was dominated by major names, the third wave has seen the entry into the market by lesser-known HMC members – or ‘Tier 2’ founding colleges.

This development became particularly evident when Hurtwood House, who has emerged as a surprise major ‘player’, opened what they refer to as a ‘HD’ branch in Ningbo, China, in 2014. Further schools appeared in Shanghai, Beijing, and then Qingdao, in 2018. Another ‘HD’ branch will open in Kuala Lumpur in 2020. It was announced in early-2018 that those intending ventures into China included Myddelton College in north Wales, a member of the 38-strong Society of Heads (SofH). Also, Lucton School, Herefordshire, opened a branch in Shanghai (Pudong) in 2018. As further testament to this opening up of the market, in addition to the founding colleges originating largely from England, a limited number of institutions from Australia, Canada, and the United States are now also involved.

Normalisation and legitimisation

In 2016, The HMC magazine (aimed at member schools and their clienteles) featured a section encouraging principals to follow the examples of the pioneering schools in establishing satellites overseas. The principals of Cranleigh, King’s College and Malvern each authored a short piece (Reader, Biggs, and Clarke, 2016) telling the story of how their respective satellites came to be. While acknowledging the financial benefits, each testimony highlights the cultural benefits of the enterprise, using the language of partnership, adventure, and global citizenship².

Elite schools are typically keen to hide their commercial behaviours as these are at odds with their efforts to emphasise a disinterested, aristocratic ethos. Their internationalising practices may be hidden or very carefully framed as a result (Courtois, 2016). While, in a way, the HMC magazine pieces confirm that commercial activities need to be justified, they also indicate that the practice of establishing profitable satellite colleges was by then at least partially normalised and legitimised, and no longer a questionable practice to be hidden from view.

Diversification and state-sponsorship in the GEI

These schools must be seen in light of the wider GEI, they are part of this phenomenon to do with the exportation and standardization of educational goods, as well as the network of agents and actors facilitating their prolific activity. Despite their prestigious affiliation, their location in the developing world, their use of new buildings, their non-white demographics and their lack of HMC membership place these satellites firmly in the category of ‘non-elite private schools’ described by Pizarro and Quirke as part of the GEI (2017).

While it was initially described as unitary, the ‘satellite college’ model has expanded and evolved over time. It now comprises of various, sometimes complex legal models (agreements, consultancies, franchises, licenses, so-called ‘manchises’) involving various levels of interaction and control and diverse ownership models. This has facilitated the entry of new actors, which are not schools, but financial entities and corporate intermediaries.

Characteristic of the GEI, these ‘satellite colleges’ have developed with a network of ‘middlemen’ facilitating entry into precarious markets such as China. One London-based law firm, Bird & Bird, has now acted for 80 schools (Jack, 2019). Bromsgrove School Mission Hills, in Shenzhen, was opened in 2016 in partnership with ‘Mission Hills Group’, China’s leading integrated golf, hospitality and leisure group. Prominent is British Education Ltd. (BE

Education), founded in 2003 by Old Etonian entrepreneur William Venbergen, and which describes itself as the ‘leading provider of international education services in China’. It was announced (Bow, 2017) that BE Education was mulling over plans for a London stock-market debut, valued at GBP 300m. In 2016, it had helped to establish Wycombe Abbey in Changzhou, as the first boarding school in mainland-China. Moreover, it acts as a ‘bridge to British education’ offering advice and placement in top schools. For its part, King’s College India owes its existence to the involvement of the Indian branch of the private consultancy firm Anglo Schools International Services Ltd (ASIS) (Biggs, 2016). Locally-based entrepreneurs are also facilitating growth, in China especially. A noticeable example involves parent and investor Jianjun Lyu, who decided to help Merchiston Castle open a boarding school in Shenzhen, after his own son had attended the school back in Scotland (Denholm, 2017). These agents, networks and actors within the global education industry are powerful facilitators and influencers as well as significant financial interests. The emergence of networks of facilitators and private investors is consistent with what has been observed in contexts where the GEI has reached its full development, such as the UAE (Ridge, Kippel and Sami, 2016).

As already noted, whilst the wider GEI often does not have the history or connections to introduce ‘elite’ educational goods (Pizarro and Quirke, 2017), the borrowing of these established school brands allows for the development of new products aimed at the middle classes in South-east Asia and elsewhere. Whether or not the Harrow or Dulwich ‘brands’ are already known in the targeted markets, through the work of powerful facilitators and promoters, the GEI can also create a desire for this type of education (Shin, 2016). The introduction of this educational good within the market of international schooling can be seen as a new advance of the GEI as well as a notable change in the behavior of elite private schools. Maxwell and Aggleton (2016) explored how, within the UK context, private schools were using certain

markers to try and establish themselves as elite schools; in this case, it is the brand of elite British education that is commodified far beyond British borders.

The growth of these schools also points towards a further development in the GEI that of the increasing and influential state-sponsored nature of marketization. As is typical under neoliberalism, the expansion of markets is facilitated by states. As in higher education (Kosmutsky 2018), the expansion of satellites has been significantly aided by the willingness of states to establish competitive ‘education hubs’ (Erfurth, 2019) and our data reveals the implantation of satellites in most of these ‘hubs’. But, state involvement is also clear to see in the context of the UK Government’s ‘GREAT Britain’ campaign and recent international trade policy activity. The UK Government launched its ‘GREAT Britain’ marketing initiative in 2012. This was the biggest-ever integrated British Government international marketing campaign aimed at selling British products overseas. With an expenditure of about £50m, the project aimed at generating up to £250m within two or three years. The project initially targeted nine countries, including India and China. It soon began to involve the overseas marketing of British education and in 2013, just after the project was launched, it was (correctly) announced (Harper, 2013) that:

British schools based overseas now contribute almost £1 billion in revenue to the UK economy...in response British schools have been setting up branches overseas.’

In 2013, two more Repton branches were opened, partnered with Evolvence Knowledge Investments, both in the UAE - Repton Abu Dhabi, and Foremarke School Dubai. At this point in time, it was being estimated that the overseas branches alone brought in £30m. Further, it was said that:

‘The number of British schools is expected to grow as education becomes part of the GREAT British marketing campaign to raise the profile of British brands abroad.’

This state-level involvement in the GEI marks a significant shift in the way the phenomenon is evolving as it further facilitates corporate strategies that not only typical GEI actors but also more traditional institutions can follow.

The field is now recognized by the British Government as a guaranteed export-earner, especially ‘post-Brexit’. Former British Prime Minister Theresa May visited China in February 2018 and agreed £500 million worth of trade deals. Education was at the forefront of discussions, as has been noted about other recent global trade agreements (Robertson, 2017). This sort of development is helping to fuel the increased supply of British-ethos private schooling abroad. Indeed, two elite private schools (Reigate Grammar School, and Wycombe Abbey) even announced new developments during the visit. Reigate even said that it would open five schools in China, starting with one in Nanjing in 2020 as part of a partnership with Kaiyuan Education Fund, backed by the China Development Bank (Woolcock, 2018).

In July 2013, the UK Department for Business, Innovation and Skills, had published *International Education Strategy: Global Growth and Prosperity*. That Strategy document (p.16) had noted that there were ‘approximately 19,000 pupils studying at 29 overseas campuses of UK independent schools.’ In March 2019, the UK Department for Education, and the Department for International Trade, published a follow-up report, *International Education Strategy: Global Potential, Global Growth*. Simply put, the 2019 Strategy plans to increase the *potential* of educational exports, raising the number of international students in UK universities from the 458,000 to 600,000 and to raise income generated by educational exports from £20bn per year to £35bn by year 2030 (Civinini, 2019).

The 2019 Strategy points (p.4) out that educational exports include ‘over £1.8 billion generated by our transnational education (TNE) activities, an increase of 73% since 2010 in current prices’. The Strategy makes it clear that it is felt that UK-based schools have enormous

potential for generating export earnings, but establishing a branch overseas needs support and guidance. The Strategy states (p.2) that:

'UK education is punching above its weight, but below its potential. The sector tells us that they face a range of issues in increasing their international footprint. Some businesses may believe they are not suited to overseas sales, or lack the confidence or knowledge in how to pursue them. They may not have the information they need about how to tackle policy or regulatory barriers to access overseas markets, how to seek and get finance, or even where to go for help.'

Embedded within this policy document is the neoliberal ideology of markets in education; the existence of markets with diverse educational offerings, and the idea of educational 'goods' and 'services' that have a realisable market value. Despite presenting as unique, aristocratic and somehow above crass materialism (Wakeford, 1969), British elite schools have seemingly embraced this ideology.

Concluding comments

We have argued here that the 'satellite college' is located at the intersection of two inter-linked globalisation of education phenomena; the continued appeal of an exclusive, 'British-style' education based upon the notion of 'Englishness' appealing to the emergent middle-class, including the aspiring 'GMC' often residing in 'Tier-2 cities' (aiding demand), and the expansion of the GEI, facilitated by British Government-backed agencies which has aided entry into 'Tier-2 cities' by 'Tier-2 schools' (aiding supply). 'Satellite colleges' can be interpreted as an unexpected product of an expanding and diversifying GEI. They are essentially commercial ventures that are using the symbolism of elite English private schools to differentiate themselves within an increasingly crowded international school market. This is

markedly different from the standard ‘British’ elite educational offer in the UK, transmitting an image and class consciousness inherent within the uniqueness and ‘tone’ of elite English schools. Potentially, this indicates a shift in the principles of legitimation traditional elite private schools rely on – and future research is needed to examine this in greater depth.

Their historical association with the elites in nation-states such as Thailand gives these schools considerable symbolic power, making them potentially attractive beyond the UK. The role this plays in other settings, such as mainland-China, remains under-researched. Implicit in their names is the prospect of networking with the powerful, something that other forms of exclusive private education (e.g. international schools) cannot promise. It is significant that the trend was started by some of the most prestigious and established UK schools despite the centrality of exclusivity and ‘Englishness’ in their identities. A more systematic investigation into how these schools ‘present’ and ‘sell’ themselves within local education markets (especially in relation to other ‘international schools’) offers an avenue for further investigation and research. Further, the state-sponsored nature of their development also marks a significant shift in the development of the GEI. Tracing the state-level facilitation and support for the growth of these English ‘Public School’ satellites represents an important forward research agenda in the context of how the GEI operates.

The ‘model’ in this context is very much trade-orientated and financially driven, involving an ethically controversial yet largely under-discussed and under-investigated two-pronged flow of revenue back-to-Britain, from both fees, and profits. This revenue stream is put to use either by providing bursaries and scholarships, or ensuring future fee increases are minimalised. This continues to be a pragmatic business model, using the emergent service infrastructure and new client base as tools to minimize the risks. In this sense, the behaviour of Dulwich, Harrow and other historic British elite institutions does not differ much from that of other corporations/brands typical of the GEI. Economic globalisation seems to impact these

supposedly unique institutions in the same way as it has transformed the education landscape internationally. In fact, our research suggests that under the current circumstances of state-sponsored marketization of education, the principles of legitimation of elite schools may be shifting from the cultural and moral domain to the economic domain: rather than charities, they can now present as active contributors to the UK export industry. Yet this should not erase the problematic aspect of extracting fees from aspiring families in ex-colonies to supposedly equalise chances among domestic students. In this context, the pattern delineated is similar to that observed in higher education, and the development of IBCs.

The data we have compiled here on the growth of these ‘satellite colleges’ raises further unanswered questions about *which* private schools have opted to get involved and who have remained absent. By 2019, the ‘model’ has thus far involved 10 of the 18-member Rugby Group, and just five of the 12-member Eton Group (i.e. exactly half of the two groupings). But, only three of the 14-strong Founding body of HMC schools have got involved (Bromsgrove, Repton, and Sherborne). Further, and arguably more significantly, only three of the nine-strong Clarendon Commission schools are involved (Harrow, Rugby, and Shrewsbury), although Westminster looks set to get involved in 2020. In other words, not all of Britain’s elite private schools by 2019 had yet to become involved. This, of course, includes Eton College, educator of 18 of Britain’s 52 Prime Ministers. Parallels can be drawn here at the level of higher education, which has similarly witnessed some institutions opting not to get involved (Wilkins and Huisman, 2012 p.12)

An important avenue for future research is to explore how decisions not to open branches overseas might be linked to notions of ‘legitimacy’ in the elite status of educational institutions (at school or higher education levels) and how such qualitative judgements are arrived at. In part, the explanation could be financial; they do not (at present) need the money, and have other steady, reliable revenue streams that can create bursaries and scholarships in

Britain. However, the threat of the British Government in the future levying VAT on school fees might change this situation, leading to a sudden growth spurt. As highlighted earlier, 120 new projects were being considered in 2019 and this presumably might include totally new potential players (Jack, 2019). Moreover, this might offer the clue as to what will represent the ‘fourth wave’ of activity. One major avenue of further research would be to consider how the satellite schools position themselves in relation to their founding schools; how ‘close’ and replicated they consider themselves to be. It might be that founding schools seek to carefully manage the development of satellites in ways that do not compromise the elitism of their founding school. Alternatively, research would be valuable to explore how expansion overseas might be used by institutions to further legitimise their elite status.

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