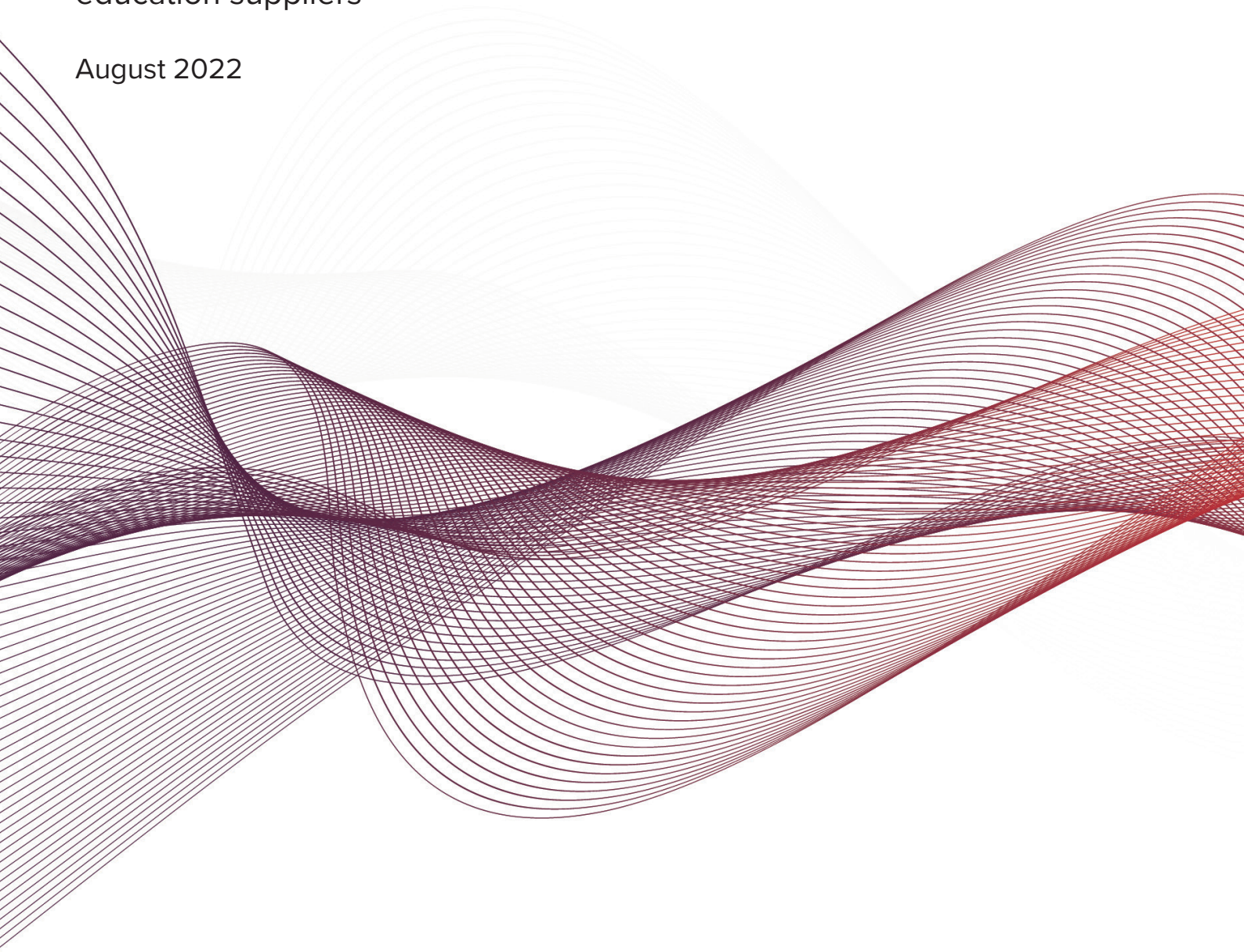
ISC RESEARCH

WHITE PAPER

What makes the international schools market different?

And what that means for school admissions and education suppliers

August 2022



Introduction

There are many assumptions and claims made about the international schools market. For the purposes of this white paper and its data collection, ISC Research focuses on those international schools that offer learning in the language of English or as one of the main languages of learning.

As an established and widely recognised sector of global K-12[1] education, knowing what makes the English-medium international school market different from other education options is as important for the industry as it is for parents making an educational choice for their child.

This white paper explores the common factors that set the international school sector apart. It looks at how this maturing market is differentiating itself from other K-12 educational offerings to inform school admissions, education suppliers considering and supporting this market, school improvement, and professionals wanting a better understanding of the international schools market.

[1] Kindergarten to Grade 12 i.e. all students between the ages of 3 and 18

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Our contributors

Thank you to the following contributors who have helped us view the international schools market through regional contexts:

- Aditya Gupta, CEO of India Didactics Association (IDA)
- Graham Carlini Watts, Director of Professional Learning at the Association of International Schools in Africa (AISA)
- Jonathan Viner, Publisher of Nordic EdTech News and CEO of 10 Digits
- Julia Garvey, Deputy Director General at British Educational Suppliers Association (BESA)
- Liz Duffy, President of International School Services (ISS)
- The field-based research team at ISC Research

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1. What is an English-medium international school?

For the purposes of this white paper and for its data analysis, ISC Research includes an international school if:

- It is a privately operated school that delivers a curriculum wholly or partly in English to some or all of its students aged between 3 and 18 in a country where English is not an official language
- Or, a privately operated school that delivers a curriculum other than the host country's national curriculum wholly or partly in English to some or all of its students aged between 3 and 18 in a country where English is an official language

If the school is an online school, ISC Research includes it in its online international school classification if:

- The international online school offers a whole English-Medium curriculum for children of any age between 3 and 18, and is publicly accessible for students from a variety of countries to enrol
- Or, if the online school only enrols students from within one single country, it must offer a whole English-Medium curriculum that is not the national curriculum of that country

A note on international school fees

Although privately operated, international school tuition fees vary significantly depending on the type of school and its location. Based on the 1st July 2022, the global average annual tuition fee at an international school is $10,104. By country, this

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annual average can range from as high as $30,000 to attend an international school in Algeria, to $120 to attend an international school in Somalia.

2. The top 5 factors that differentiate English-medium international schools

1. English as a major medium of instruction

According to the OECD in its 2020 report *How Language Learning Opens Doors*[2], the English language is "the one considered most necessary for education and work". This OECD research paper undergirded and shaped the Foreign Language Assessment (FLA) which PISA (the Programme for International Student Assessment which assesses 15-year-olds in 79 countries around the world) will be introducing in 2025[3].

The addition of the FLA and the monitoring of English learning through PISA speaks to how English has become central to governments around the world.

For many parents, language lessons alone are not enough. Nor is after-school tutoring. For those parents who live in a non-English-speaking country and want

[2] OECD (2020), *How language learning opens doors*, OECD Publishing, Paris
[3] OECD (2021), *PISA 2025 Foreign Language Assessment Framework*, PISA, OECD Publishing, Paris

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their child to have access to global higher education and career opportunities, immersion of learning using the English language remains the prime reason to select an English-medium international school.

As of July 1st 2022, ISC Research data shows there are 13,180 English-medium international schools now teaching 5.89 million students aged between 3 and 18.

INTERNATIONAL SCHOOLS MARKET

In July 2022



13,180



5.89m

An increasing number of international schools are offering bilingual and multilingual learning with English as one of the main languages of instruction.

2. Pathway to global higher education

In addition to the language of instruction, most international schools follow a curriculum that prepares students for globally recognised qualifications at ages 16 and 18.

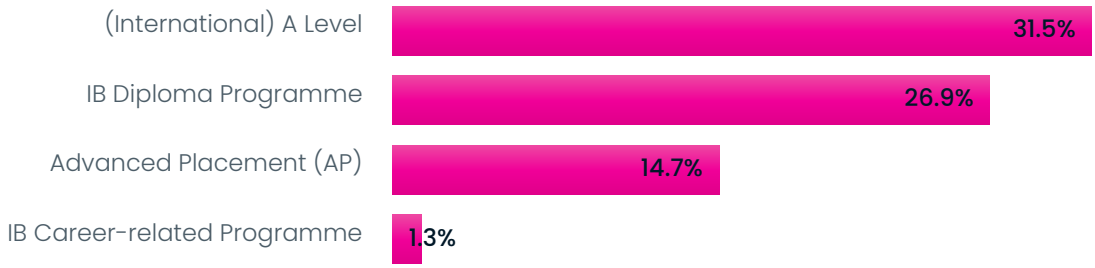
The teaching and learning approach, exit examinations and leaving certificates offered by international schools are commonly accepted by the majority of the world's higher education institutions including the highest ranked universities, as well as most multinational companies.

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ISC Research data indicates that the most popular qualifications offered by the world's English-medium international schools are A or International A Levels, International Baccalaureate Diploma, and the Advanced Placement.

Leading qualifications

% of international schools serving 16-18 year olds



Children attending domestic schools in many countries are required to submit their transcript (record of learning and qualifications) to an international university via a third party which will translate it into a form that the university may recognise. This can be an administrative and costly process for students and their parents.

> Reputable international schools, while supporting destination success for their students, also encourage a 'best fit' approach for future pathways to address the strengths and goals of each individual student.

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Many international schools promote their alumni university destinations in school marketing and admissions content as aspirational parents are influenced by the potential for their child to follow a similar pathway. Reputable international schools, while supporting destination success for their students, also encourage a 'best fit' approach for future pathways to address the strengths and goals of each individual student. This can conflict with the ambitions of some parents who look to their child's school to fulfil their personal dream of a child at Harvard, or their child as a doctor. Many parents select an international school to achieve this ambition.

Destination success can, of course, also be achieved in government-funded and domestic independent schools but a more unique offering of many international schools is the university and college counselling support for students.

For most premium fee and some mid-market fee international schools, this involves a dedicated college counsellor or counselling team. For other international schools, this can include allocated time by a teacher or other staff member to support students with college advice and selection. In these cases, as an employee of the school, the college counsellor is addressing the best interests of each student rather than being influenced by commissions from certain universities. Most international schools do not use agents who typically take a student finder's fee from the universities they represent.

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Some international school associations host events for college counsellors and university officers to network, and some international schools invest in membership to organisations such as the International Association of College Admission Counseling (IACAC) or to the Council of International Schools (CIS) university counselling services for the same reasons. Some international schools collaborate within regional groups to host university fairs e.g. Myanmar International School Counselors Association.

Many international school Heads and Admissions Managers tell us in our qualitative research that parents value the student-focused college guidance that their school offers and consider it an important factor for selecting an international school.

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3. The teachers

Most international schools employ expatriate teachers with the skills to teach the curriculum, and with the experience to facilitate the learning approach that is delivered by the school. As most curricula, and teaching and learning approaches offered in international schools are Western, this has traditionally meant many teachers from the UK, US, Canada and Australia. The extent of Western presence within a teaching staff typically varies dependent on a school's budget (although other factors, such as more purposeful diversity within staff cohort, is now also influencing this in a few schools). As a result, the percentage of Western teachers within premium international schools is generally much higher than in low fee international schools.

There is a historical context to this employment bias fostered by the colonial intentions of early international schools. Whilst some international schools are now working towards a more diverse and equitable vision, many international schools still employ predominantly Western educators.

There's no denying it; many parents, particularly Asian parents, want white Western teachers for their child and, as a result, select an international school for this reason. However, some parents are now expressing a desire for their child to also retain their home culture, language, heritage and religion, and a number of governments require this. There is an emerging trend for international schools to employ a more diverse teaching staff, selecting educators for their cultural understandings and different experiences, and upskilling necessary curriculum knowledge and pedagogical principles internally. A truly diverse teaching staff will continue to set an international school apart from other schooling options – and for more equitable reasons.

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One disadvantage of international schools viewed by some parents is the transition rate of teachers who typically move schools more frequently than in domestic schools. This is due to the expatriate nature of most international school teachers who typically work to short contracts, often of 2 or 3 years.

4. Class sizes and student:teacher interaction

Most international schools have much smaller class sizes than other school types serving the same age of children. The current average student:teacher ratio across the entire international school sector is 10:1.

Student:teacher ratios do vary by international school type and location. For example, the average student:teacher ratio in premium fee international schools across the global sector is 9:1 compared to 10:1 in mid-market fee international schools.

Average student:teacher ratios across all international schools in the UAE (United Arab Emirates) is 13:1 compared to 11:1 in India, and 7:1 in China.

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AVERAGE STUDENT:TEACHER RATIOS IN INTERNATIONAL SCHOOLS

In July 2022

10:1

PREMIUM FEE INTERNATIONAL SCHOOLS 9:1

MID-MARKET FEE INTERNATIONAL SCHOOLS 10:1

INTERNATIONAL SCHOOLS IN UAE 13:1

INTERNATIONAL SCHOOLS IN CHINA 11:1

INTERNATIONAL SCHOOLS IN INDIA 7:1

This ratio of student:teacher can differ significantly from local government-funded schools where class sizes are typically much larger. For example, there are, on average, 60 children per teacher in schools in China, and 50 in India.

Lower student:teacher ratios mean more individualised learning attention, more potential for student voice, and fewer behaviour and class management demands.

5. Holistic development of students

International schools are, in general, recognised for focusing on a more holistic development of students i.e. addressing the social, emotional, psychological and academic growth of each child. This is delivered through practical creative arts and

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sports learning and facilities, learning outside the classroom, and service learning, as well as through pastoral initiatives, extracurricular activities, etc.

In some countries in Asia, this holistic approach can be dramatically different to the narrower curriculum, rote and didactic approach to learning, and highly pressured examination systems required by government-funded schools.

However aspirational parents might be, most also want happy children too. The blend of academic success in combination with better wellbeing that international schools can provide is very appealing to many parents.



3. The reasons why international schools can differentiate

International schools vary enormously, but the international context of the market allows for significant educational differences to other K-12 schools for several reasons:

- The independent status and fee structure of international schools can give them **more autonomy** around curricula choice, operational structures, facilities and budget expenditure than government-funded schools.

- The independent nature and global vision of international schools gives them **the potential to adapt more quickly** to new educational developments and solutions.

- The global community of international schools offers **greater potential for developing global mindedness**, international partnerships, and international understanding.

- The global context of international schools means they can attract a **diverse global talent pool of teachers and leaders** who bring teaching skills, cultural perspectives and lifestyle experiences from different countries.

- The medium of learning is often not the mother tongue of most students attending international schools, meaning **English as an additional language (EAL) provision** is, by necessity, a requirement.

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- International schools benefit from a **collaborative ethos** within the sector and support each other in associations, conferences, and specialist groups where global best practice, professional learning and networking occur.

- The breadth of school types, sizes, fee levels and location contexts within the international schools market create a **melting pot of experiences**, challenges and innovation that are well shared across the sector and provide important perspectives and appreciation that can benefit everyone.

- Competing for student admissions and staff means that international schools must maintain **good educational standards** which drives up quality. Accreditation is popular within the international schools sector to help raise standards and provide a quality mark.

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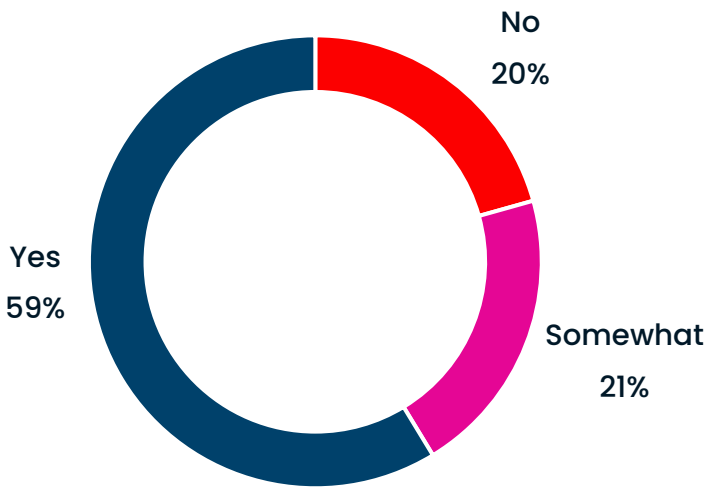
4. Do international schools compete with host nation schools for student admissions?

During the Edruptors@School Conference in July 2022, ISC Research asked international school delegates about the place of their international school within the local community. 51 people responded to the survey representing 33 different countries. 90% were senior leaders at international schools.

Competition beyond other international schools

In most major cities, international schools compete against each other, but do they also compete with other types of schools? We asked respondents if domestic private schools in their locality also compete for student enrolment.

Competition with local private schools



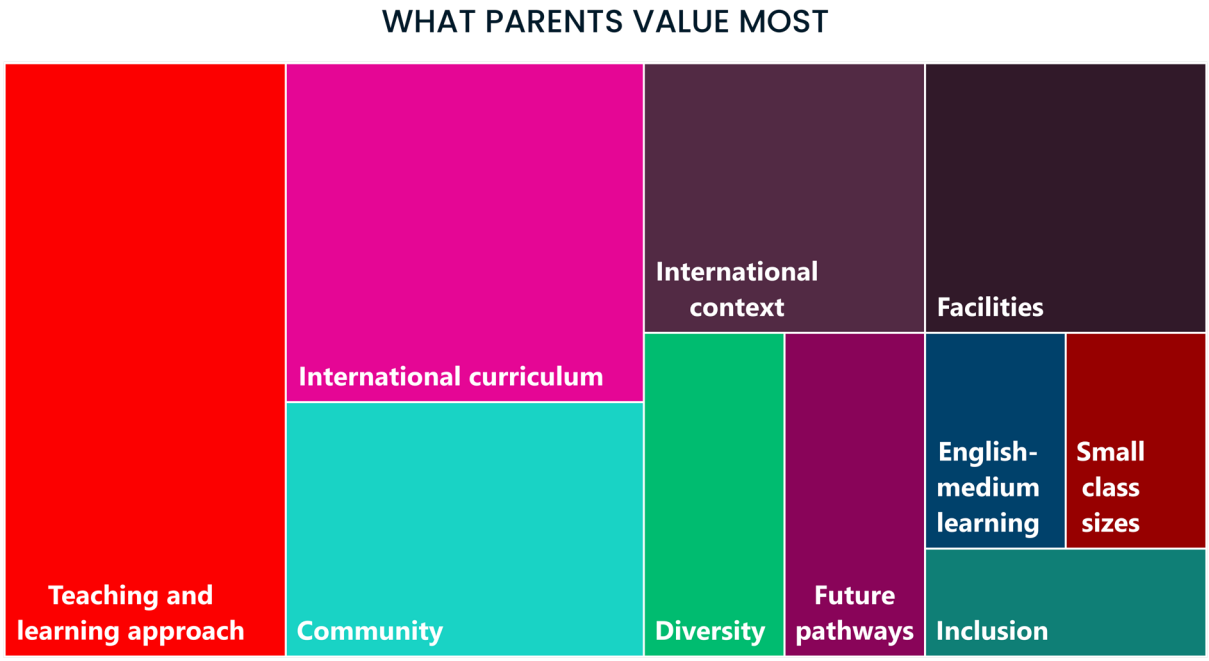
Source: ISC Research, July 2022

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Most respondents feel that local independent schools do, to some extent, compete with them for student admissions. This is for various reasons. One respondent from an international school in Morocco said, "*Many private schools offer trilingual offerings similar to our school.*" Another in Thailand said, "*English levels are generally too low for local private schools to gain entrance to our school, but some students do succeed in being accepted.*" An international school in Australia said, "*There are a couple of other private schools that run the IB (International Baccalaureate) program, but not throughout the school and not with the Diploma Programme being available to all students.*"

How international schools are valued by parents

Our respondents were asked an open-ended question about what features parents value most from their international school. The most common statements were teaching and learning, international curriculum, community, facilities, and international context.

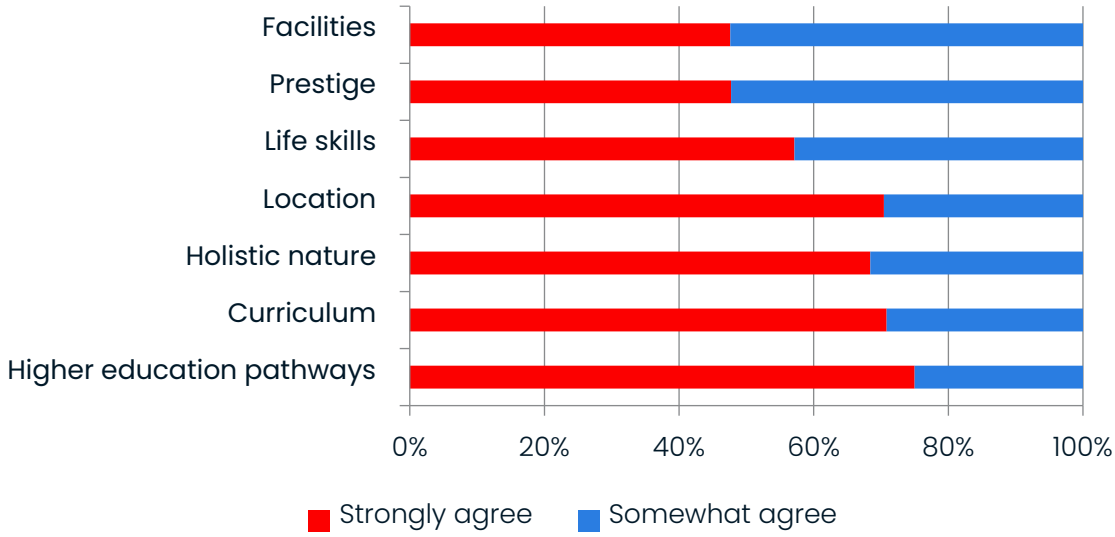


Source: ISC Research, July 2022

The marketing messages that make an impact

Respondents were asked about the marketing messages that are currently most influential for the international school. Higher education pathways, curriculum, location, and holistic nature of the school were identified as the messages generating most admissions enquiries. Life skills, prestige of the school, and facilities were also ranked highly. These factors were all considered more influential than price point, co-curricular activities, and tech offerings.

Influential marketing messages



Source: ISC Research, July 2022

The impact of host government legislation

We asked respondents about the impact to their international school of government regulations within their country of location. This varies significantly from country to country. A few countries prohibit access to international schools for host nation children, some other countries limit access to host nation children through enrolment percentage caps, and others require government approval for the

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enrolment of a host nation child. Some countries have strict regulations regarding curriculum content and/or languages of learning. Other countries have few or no restrictions at all. Specific details of country regulations that impact international schools are detailed in the full library of ISC Research market-specific reports and commercial intelligence reports for key countries.

> 57.5% of the respondents in the study said they find local education legislation and regulation restrictive for their international school.

57.5% of the respondents in the study said they find local education legislation and regulation restrictive for their international school. 20% said that, as an international school, they are not subject to education legislation or regulation. And 7.5% of respondents said they find the local legislation and regulation supportive to them as an international school.

5. Regional trends that make international schools different

Although many features of international schools differentiate them from other K-12 education options regardless of their location, the weighting of how important some factors are varies by location. Here we consider the differentiating factors that are most significant for parent choice in two key subregions of the world.

South-East Asia

The international schools market throughout South-East Asia has developed significantly in the past five years. According to ISC Research data from 1st July 2022, the number of English-medium international schools in South-East Asia has increased 25% from 1,528 schools in 2017 to 1,905 today. Enrolment has increased 16% in that time from 503,100 students in 2017 to 585,300 today. Leading countries for international schools include **Indonesia, Malaysia, Vietnam, Thailand and Singapore**.

International schools in South-East Asia



International school enrolments in South-East Asia



In general, along with the higher education pathways and learning in the language of English, there are several factors that influence international school selection most in South-East Asia:

- Facilities in international schools are, in general, dramatically better than most government and domestic private schools throughout South-East Asia, and these are valued by local parents. In Thailand, where parents are particularly attracted to contemporary school facilities, children will be moved from school to school to access newer or better facilities as they become available. As a result, international schools in Thailand will frequently **improve their facilities** as a route to attracting local enrolments.

- More direct student-teacher engagement due to **small class sizes**. Student-to-teacher ratios are typically lower compared to domestic schools. For example, in the Philippines, the average student:teacher ratio at international schools is 10:1 compared to approximately 30:1 in government-funded schools, and 40:1 in local private schools.

- Educational technology has improved throughout K-12 schools in South-East Asia as a result of COVID. Needless to say, edtech remains far more limited than in most international schools in the region which tend to offer more tech-based resources as well as better teaching skills to support learning through **technology**.

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- Student wellbeing and a focus on the **holistic development of a child** that international schools promote, is becoming increasingly valued by South-East Asian parents and is not a common offering in domestic schools.

- Prestigious international schools and respected **international school brands** throughout several countries in South-East Asia, particularly Thailand, Malaysia, Singapore and Vietnam, continue to attract the wealthiest, educationally aspirational parents, including those from countries like China and South Korea where international K-12 education is highly regulated and restricted for host nation families. These highly visible schools also help to raise awareness of the wider international school market to both host nation and expatriate parents throughout South-East Asia.

- International schools in South-East Asia offer a far more **diverse student population** than local schools.

- International schools generally **offer better facilities for children with special educational needs.** In Singapore, where international schools are restricted for host nation children, those with special educational needs can often gain government approval to attend an international school in order to access the improved support.

- External partnerships, particularly those that support **student pathways** are increasingly prevalent in leading international schools in South-East Asia and are becoming recognised as a differentiating factor for parent choice. For example, Global Indian International School in Singapore has an affiliation with Singapore Law Society through its Law Summit initiative supporting student pathways into law.

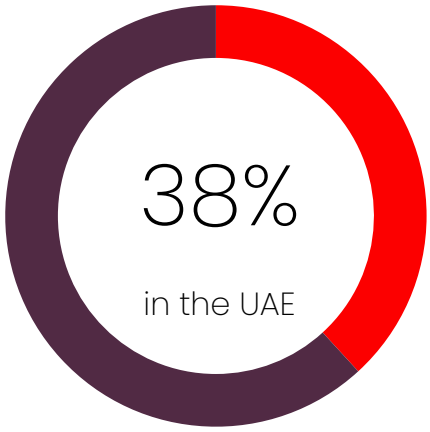
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The Middle East

The Middle East is one of the leading regions of the world for international schools and students.

According to ISC Research data for 1st July 2022, there are 1,995 English-medium international schools in Western Asia (the Middle East excluding Egypt) teaching **1.75 million students**. The UAE leads the region with 762 international schools.

International schools in Western Asia



In general, the international schools in the Middle East distinguish themselves from other K-12 schools for the following reasons:

- The **global higher education pathways** that international schools offer are considered an extremely important selection factor for local and expatriate families living in the subregion. For local children, this also relates to their access to generous scholarships to foreign institutions. For example, the

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revised Saudi scholarship programme of 2022 that is available to Saud nationals.

- The international viewpoints and cross-cultural preparation international schools offer that prepare young people for higher education and careers.

- International school campuses generally **offer more innovative, creative, sports and/or vocational facilities and extra-curricular activities** than other K-12 schools. For example, many international schools in the Middle East offer sports and creative arts facilities and clubs, and some have media studios, maker spaces, etc. This breadth of offerings is also noticeable in curricula where humanities, music and arts are not commonly offered across other K-12 schools in the subregion.

- Schoolwide **pastoral care and wellbeing focus** is a significant factor that differentiates international schools from other schools in the Middle East.

- Some level of provision for children with **special educational needs** is accessible within many international schools in the Middle East, and a specialist provision in a few, compared to little or no provision in most other schools.

- In some countries, such as Saudi Arabia, the special government exemption that is required for a host nation child to attend an international school creates a kudos that drives demand.

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6. The international schools market through regional contexts

To understand how the international schools market is viewed through different lenses, ISC Research spoke to a range of regional experts. They comment on the place of international schools from a variety of perspectives including demand within their region, the requirements of international schools for importing suppliers, as well as the potential for exporting suppliers to the global international schools market.



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International schools in an African context



Dr Graham Carlini Watts is an international education consultant and Director of Professional Learning at the Association of International Schools in Africa which is a membership organisation of accredited international schools across the Africa region.

"There are schools that call themselves international in Africa that are 99% host nation teachers and kids that are simply offering an overseas qualification. However, within our international school community, there are probably three characteristics that are common that make them different to other schools: They are a global community of teachers and students, with kids from America and Europe but increasingly from Asia, including China and India, as well an increasing number of host nation students and teachers (with some caveats such as Senegal where the law states that Senegalese children cannot attend, and Senegalese teachers cannot teach in international schools). All international schools offer at least one international qualification such as the IBDP (International Baccalaureate Diploma Programme) which most government schools in Africa couldn't even begin to afford to offer. And the third commonality is a pathway for students to go to global universities and is the main reason for the increased popularity of host nation students. In some countries, international schools are the only schools that can afford good internet access, and in Nigeria, which has introduced planned electricity load shedding (power cuts) due to

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> supply issues, international schools are often the only schools that can afford generators to power air conditioning. "

He describes some of the trends in practice that he is seeing in international schools in Africa:

> "International schools in Africa, mindful of the privileges that they experience, are increasingly focusing on service learning. That's been a growing trend over time, but I think the challenges of the pandemic have made schools very mindful of their privileged backgrounds and contexts which has directed their commitment to a schoolwide approach. Examples include mentoring programmes between international school teachers and teachers in local schools, and other ways that kids and teachers and schools can contribute to the host nation infrastructure.
>
> DEIJ (Diversity Equity Inclusion Justice) has been a big focus in most international schools in Africa during the past two or three years. There are various issues that are raised by teachers of colour from North America and Europe, and those that are raised by host nation educators. Some of these issues intersect, but some don't such as inequities of salary, and inequitable access to professional development where training occurs overseas during the summer which then impacts teachers' willingness to apply for middle leadership. There is also an increased focus on the intersectionality within DEIJ; a lot of conversations about BIPOC educators, black indigenous people of colour, women in leadership and empowering women, and LGBTQ+ identity. I know of several international schools in Africa working with DEIJ consultants from their host nation to support their professional development. "

Graham believes the nature of international schooling in Africa will be different going forward as a result of the successful use of technology:

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> "The use of edtech in teaching and learning is a phenomenon that will remain in international schools in Africa. Thanks to COVID, the tech is set up and the teachers are now sufficiently competent to enrich teaching and learning, and to support hybrid learning where necessary if it means a school not losing a child. It's a brave new world and I think these types of technology-rich teaching and learning innovations will remain in the region."

He describes how the technology needs of schools in Africa make it a unique region for the edtech industry and other education suppliers:

> "Edtech start-ups are emerging in Africa, particularly in Nigeria and Ghana. Some schools go for the major US platforms, and some push towards the free global solutions, but some of the other digital resources they are investing in are from small edtech start-ups coming out of Africa. Having someone on the ground in-country is much more practical for schools in Africa but it's more than that. I think the challenge for big tech giants is taking what works globally and honing it down into something that will meet the needs of schools in Africa which typically are relatively small and don't have big budgets. African suppliers understand some of the challenges around electrical supply and connectivity, they are often much more affordable than the international providers and can be very effective at tailoring to the needs of the school. In some cases, these are solo entrepreneurs who have worked as a teacher or tech support in an international school here and have moved outside the school to create their own start-up and are being brought in because they understand the context of schools here.
>
> International schools in Africa are hubs of innovation. If there's no electricity, they buy a generator, if there's no Wi-Fi, they set up their own antenna on the roof to get satellite access. Many of our member schools no longer buy textbooks and instead use digital books because they can't get textbooks delivered. International schools in Africa are not looking to be a replica of a

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school elsewhere, they're looking to be innovative and to develop a creative state of mind in students."

A view on international schools and the edtech market from India



Aditya Gupta is CEO of India Didactics Association, the largest national association of education stakeholders in India.

"India is a very large country with 1.6 million schools. The enormous size and the immense diversity imply that it is not a one-size-fits-all country. We cannot look at market differentiation based on curriculum alone; it's a combination of curriculum, geographies, demographics, cultural diversities, languages, fee structure, etc. that vary significantly between various states in India. There would be variation based on the infrastructure capabilities of the school, city and the region. Although internet penetration across the country is reaching almost 90% thanks to progress over the last two years, bandwidth still varies significantly across the board."

Aditya speaks about India's edtech market and its shift towards globalisation:

"Brand India has changed. Indians and Indian companies are creating global footprints. Today India is a very strong global player, a country that is making

> rapid progress on every front. Many global CEOs, including Microsoft, Google, Adobe, IBM and others are headed by Indians. Byju's, the world's largest edtech company, is of Indian origin and, along with many other Indian unicorns, they have become the flag bearers of India's growth story in the edtech space. These companies are creating and showcasing a path to other Indian entrepreneurs that, apart from the large domestic market, they should aspire and can achieve tremendous success in international markets and go on to become large global companies."

The Indian curriculum is building a global presence which, Aditya explains, is opening the doors for more of the country's education suppliers:

> "The increasing popularity of the Indian curriculum overseas (e.g. there are 270 schools just in the Middle East following the Indian curriculum) is encouraging more Indian edtech suppliers to sell to the international market.
>
> Until recently most edtech companies in India have kept to a standardised model and focused on trying to fit their products around the Indian curriculum and into existing systems, rather than push boundaries to create more innovative and impactful outcomes. This is also because traditionally, the Indian education system had little space for flexibility and adhered to standard structures and curricula."

He explains why demand for international curricula is increasing in India and how this is influencing India's education supply sector:

> "In recent times, international curricula have started to gain momentum and is seeing growth in the country. General perception, which is based to quite an extent on actual substantiation, is that international curricula have more

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> flexibility in terms of content, pedagogy and assessments than the Indian curriculum where the chance to be innovative is limited. Thus, there are now many more cases of Indian companies developing products with more flexibility for the international school market.
>
> In general, international schools have better infrastructure capability, access to devices, focus on teacher training, and the capacity to implement solutions compared to Indian curriculum schools in general. It's a market in which the suppliers feel they can innovate because it offers opportunities to leverage change."

Aditya describes the growing respect for international schools within the country:

> "There is a perception from parents, teachers and educators that international schools are amongst the most elite schools in India. Although many in Indian society still put a lot of emphasis on academic marks, and value the Indian curriculum, those parents who can afford the international school fees are willing to pay because of the perception that international schools offer better infrastructure along with quality, holistic education, exposure to practical implementation, experiential learning, and avenues for students to look to university admissions abroad. A good education abroad is an aspiration for a lot of Indian students today and so international schools, which are generally seen as the gateway to universities abroad, are now also the aspiration of the middle-class society of India."

He offers advice for suppliers seeking to build an international presence:

> "For international suppliers entering India, it's important that they commit to a long-term international strategy, investing time to develop trust and

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collaborative relationships with schools. It's a market that selects suppliers based on good quality and outcomes. The same is true for Indian companies looking at exporting globally. Education is a market that works on relationships along with quality, outcomes and pricing.

Penetrating the market in India can be difficult, but once you prove success, progress will be easier as schools do follow the lead of others."

International schools through a US lens



Liz Duffy is President of International School Services (ISS), a US-headquartered not-for-profit that supports international schools and educators in many aspects of school life including recruitment, leadership, teaching and learning, and school administration.

Liz highlights some of the differences that currently set US schools apart from international schools:

"The US has an extremely holistic pathway to higher education and in general, the US is not a very test-centred place. It's more tricky in an international school where there are kids going to multiple destinations for higher education. International schools have to prepare students for different

> application systems which vary significantly, from the holistic US approach to the test-focused UK requirements, and to other approaches in other countries in between. International schools also often have to ensure that their students meet the national standards in which the school is located. The challenge for international schools is trying to accomplish all of that and, for the staff at international schools, regardless of where they are from, to figure out how to integrate all the different pathways including those they are not familiar with.
>
> Politics has affected US schools with an intensity not generally seen within international schools. Issues such as DEIJ and critical race theory, LGBTQ rights and abortion/contraception access have unfortunately been weaponised in US schools, as seen in public school board elections, the rise of active, concerned parent groups, and book bans. School librarians have experienced pushback related to many, many more authors and types of content than they had previously."

She explains how school leadership in the US compares to leadership within an international school:

> "A Head in an international school will, in general, spend much more time than the Head of a US independent school recruiting faculty, attending job fairs, and navigating a new culture. An international school Head will generally spend less time fundraising and on alumni activities. Depending on the country, an international school Head will also need to spend time developing relationships with local government officials and ensuring government regulations are followed."

Liz shares advice for US education suppliers that are considering the international arena:

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"US education suppliers need to know about customs, shipping and country regulations when working with international schools. The market is truly global with an infinite number of regulations and, because of these complexities, it requires a trusted partner who can negotiate export-import.

The timing for ordering school supplies is very different in international schools compared to the US sector. The peak time for orders from international schools is February and March, in the US it's typically June and July.

In comparison to the US, where there is no national curriculum and where many US independent schools do not even follow the US Common Core standards, if you are a US supplier working globally, it's important to know that international schools often follow multiple curricula and have much more structure around their curricula."

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A view of the international school market from the Nordic edtech industry



Jonathan Viner is the Founder of 10Digits, an independent consultancy that supports leading edtech entrepreneurs. He also publishes the fortnightly Nordic EdTech News newsletter. He lives in Sweden.

Jonathan says Nordic edtech is gaining greater global acclaim but companies often don't realise the potential within the world's international schools market:

> For many Nordic edtech companies, growing globally is a big priority. With small and limited home markets which are currently challenged by government funding and concerns about data privacy, they are increasingly looking to international opportunities for business development.
>
> Most companies that are scaling internationally tend to look to public schools in key countries and don't yet see the international schools market as a priority; many don't realise its scale or business potential, possibly because they are not so familiar with international schools as they are not common in their own region. I think it comes down to a lack of understanding of the number of international schools there are, how they can be reached and supported, and the mentality that education is provided by governments, because that is how it's done across the Nordics.

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> Where growth does occur within international schools, it has mostly come from passionate advocates for a brand who talk positively and share their findings in their schools and on social media rather than in any strategic way.
>
> Nordic companies are increasingly responding to international expansion by putting boots on the ground, but most are still managing it remotely or through resellers and international partners who know the local landscape."

He highlights some of the brands that are already established within the international schools sector, and suggests the areas of education where Nordic brands are building a reputation:

> "Some of the leading Nordic brands with a notable international presence are Labster from Denmark, Kahoot! from Norway, Magma Math from Sweden, 99math from Estonia, and Kide Science from Finland. There is a lot of Nordic edtech innovation emerging globally, particularly related to assessing individual students and informing interventions. Some brands, like Sweden's Lexplore, are using AI and eye tracking to monitor students' reading ability.
>
> The sectors within the Nordic edtech market experiencing significant growth are core curriculum learning resources, language learning, and digital assessment. This is mostly curriculum agnostic although some companies such as Kognity have aligned digital assessment to a particular curriculum.
>
> Wellbeing is a key part of Nordic edtech because student-centred learning and student equality is integral to the curriculum, and a fundamental part of education in the Nordic region. Measuring wellbeing through edtech is an increasing part of what's happening here through companies such as School Day and Clanbeat and I'm sure we'll see more companies in the space moving forwards."

Jonathan sends a clear message to suppliers from the region:

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"If you're a Nordic edtech and you're serious about growing and scaling internationally, then your website, products and services should all be available in English."

A British supplier's perspective on the international schools market



Julia Garvey is Deputy Director General at British Education Suppliers Association, the leading trade association for the commercial education industry in the UK.

Julia identifies some of the current similarities and differences of the British and international school sectors:

"What is striking right now is the way that the pandemic has reduced rather than increased the areas of difference between British schools and international schools. Most countries worldwide are grappling with the after-effects of school closures and the need to address the long-term impact that will have on a whole generation of pupils. These are consequences that will go far further than plugging the immediate gaps of lost learning or the need to address any digital divide. Student wellbeing has been dramatically affected, with SEND (special educational needs and disabilities) pupils particularly hard hit.

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> In the UK, state schools are reliant on the government to help fund solutions and to roll out infrastructure upgrades to address these issues. Independent schools are less reliant on government funding for this but are facing the challenge of the rising cost of living, potentially resulting in a drop in student numbers as parents struggle to find the fees. We know that international schools are experiencing similar challenges with student numbers where expats returned home during the pandemic. So, at the moment, I see more that unites than divides international schools and the domestic market."

She shares advice for British suppliers looking to international schools for business potential:

> "The buying model across the global international schools market is very different to the British state and independent sectors. It is increasingly dominated by large school groups, or UK brands which have opened schools overseas. In some cases, resources will be purchased centrally and often via tendering process. This can make the buying process longer and more formal, but also means that the contracts awarded may be bigger.
>
> Relationships are key. It is important to visit countries and meet school leaders in person, to be aware of cultural differences that may impact the way business is conducted and that may require adaptation to resources. Our recommendation is to research the region thoroughly in advance (the ISC Research reports are key to this) and where available attend a trade fair such are GESS Dubai as a way of building relationships and understanding the market. Customers will appreciate that you have made the effort to meet them in their home country. Britain's Department of International Trade offers financial support to British SMEs looking to attend trade fairs in key regions around the world."

She singles out a common challenge that is addressed in ISC Research market-specific reports:

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> An issue which frequently crops up in our research of exporting educational suppliers is difficulty in understanding the governmental structure, and to a lesser extent, the political situation of the country or region they are planning to export to. In most countries, the education sector is largely managed by the state. Because of this, the autonomy and regulations schools face, including some international schools, are often a reflection of the governmental structures that exist within the region."

Julia highlights examples of offerings from the UK that might also benefit international schools:

> "There are some areas within British education that the international schools sector might look for good practice, support and resources. For example, in the UK we have some fantastic programmes to assist helping schools implement edtech effectively.
>
> The Edtech Demonstrator Programme gave a select number of schools the financing and resources to test-drive edtech products. And at BESA we have our LearnEd programme, where we tour with edtech suppliers to demonstrate solutions to schools. This gives teachers the opportunity, not just to see solutions in action, but also to speak directly with the people who make them. Our research shows that this is one of teachers' favourite ways to understand how to implement edtech solutions successfully. "

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Conclusion

The international schools market may well be maturing in some areas of the world, but it remains a market experiencing many shifts. The sector's ability to adapt and innovate in response to educational opportunities, political influences, and market competition means that understanding the nature and impact of change is crucial for informed school improvement and business development.

A range of cost-effective ISC Research products, including reports and live data portals, are available to meet the business planning needs of schools, education suppliers, investors and developers, and others supporting the market. Visit the ISC Research website or talk to an ISC Research expert about your needs.

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