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**Managerialism in international schools:
a critical enquiry into the professional
identity work of head teachers**

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degree of PhD

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Managerialism in international schools: a critical enquiry into the professional identity work of head teachers

With prior research suggesting that educational leaders in Western contexts are discomforted by managerialism, this thesis considers why, despite benign market forces and regulatory freedoms, international school Heads might find appeal in managerial identifications. The international school context, and the managers within, thereby offer a unique and important site of new theorisation.

Contrasting with studies which see education and managerialism as opposed, a re-professionalisation of Headship is proposed, not as old or new, but as something newer still – as hybridic. Theories of identity, professionalism and institutional work provide means of exploring how international school Heads separate and/or harmonise educational *and* managerial identities and to what potential ends. An industry analysis, online survey and recruitment documentation review bracket out formal and/or technical coercion towards managerial identifications. With those influences set aside, a critical discourse analysis of twenty-five face-to-face interviews gives attention to managerialism as resulting from the legitimacy of management identifications – managerialism, for some Heads, is as empowering and affirming as education.

It is shown that i) educational and managerial identifications are resisted and/or adopted because Heads find benefit in both; and ii) that managerialism is moderated in ways which construct both schools and Headship (*institutional work*) and in ways which also construct individual Heads (*identity work*). The work Heads do on and for their selves connects, in a circulatory manner, with the work done on and for their schools.

Relevant internationally and nationally, it is concluded that hybridity allows Heads to successfully accomplish management without abandoning educational identifications. While some Heads resist managerialism and others more readily embrace it, most seem to find an *occupational* and/or *ontological* balance. This study's findings are important, therefore, to serving and aspiring Heads, to school recruitment panels, to policy makers developing Headship qualifications and to academics researching manager-hybrids in this and other professional contexts.

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II. DEFINITION OF TERMS

AASSA	Association of International Schools in Africa, the Association of American and International Schools in South America
BSME	British Schools of the Middle East
CFO	Chief Financial Officer
CIS	Council of International Schools
COBIS	Confederation of British International Schools
DP	Diploma Programme (the pre-university element of the IB)
EARCOS	East Asia Regional Council of Schools
FOBISIA	Federation of British Schools in Asia
GEMS	Global Education Management Services
Head	Throughout the thesis the term 'Head' is used to refer to the most senior person within an individual school (i.e. the school's Head Master, Head Mistress or Principal)
IB	General term given to all stages of the International Baccalaureate
IBO	International Baccalaureate Organisation
IPSEF	International and Private Schools Education Forum
ISC	International School Consultancy
K-12	Commonly used to refer to schools offering an all through education, i.e. with year groups Kindergarten to Year 12 (or to Year 13 for British curriculum schools)
MYP	Middle Years Programme (part of the IB curriculum)
PYP	Primary Years Programme (part of the IB curriculum)
NPQH	National Professional Qualification for Headship
PTC	Principal's Training Centre Qualification
STrB	School Teachers' Review Body
TES	Times Educational Supplement

III. ACKNOWLEDGEMENTS

“Edward Henry Machin first saw the smoke on the 27th May 1867, in Brougham Street, Bursley, the most ancient of the Five Towns ... [Denry’s mother] saved a certain amount of time every day by addressing her son as Denry, instead of Edward Henry.” (Arnold Bennett, ‘The Card’, 1911:2)

The titular character in Arnold Bennett’s book ‘The Card’ is a fictional character, a construct of Arnold Bennett’s imagination. I am not that Denry Machin; I am not ‘The Card’. I am though Denry Machin, and my life has been defined, at least in part, by the omnipresent shadow of my fictional forefather - I am not Edward Henry, but I am Denry.

The fictional Denry did not, however, undertake a PhD. He owned a football club, became Mayor, and made a fortune from a shipwreck, I doubt though he would have had the patience to tread the academic miles, to endure the studious solitude or to wrestle and wrangle the copious theories, the overwhelming data and the surfeit of ideas into a workable thesis. Perhaps then, in some small way, this Denry has done something the fictional one never could – become a Doctor. To save time every day, I may though just stick to being called Denry.

Just as Denry (the fictional one) had the Countess of Chell and a dance coach by his side, so too have I benefitted from the kind assistance of others:

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CHAPTER 1: INTRODUCTION

This study is a critical examination of the professional identity work of international school Head teachers, an as yet under researched area of analysis. Specifically, consideration is given to the identity work of a manager class (Heads) professionalised by one set of discourses (education) but also experiencing the governance potentials of other discourses (specifically, managerialism). The study is not a comparison with the UK (nor the US or Australia), though theoretical and empirical literatures from those contexts (across various domains, most notably education and health care) have provided a useful and, in the absence of research on international schooling, necessary basis for discussion: the conceptualisation in those literatures of the relationship between professionalism and managerialism as antecedent to identity work providing a valuable source of insight.

Whereas *management* represents the functional requirements of administering an organisation (the processing of payroll, for instance), *managerialism* refers to ways of thinking that sharpen, extend and prioritise what those practices are, who is responsible for them and where they are applied - 'a stress on [administrative] procedures at the *expense* of educational purpose and values' (Bush, 1999:240 *emphasis added*). As widely reported, managerialism (as a mode of cognition) has come to dominate the politics of schooling (Hood, 1991; Coleman and Early, 2005; Ball, 2012a, 2013, 2015), these changes requiring Heads to undertake *managerial* practice and perhaps even to identify *managerially* – those terms representing the effect and the 'doing' of managerialism.

Supporters of managerialism (successive UK, US and Australian governments not least of which) contend that creating a privat(ised) quasi-market in educational services fosters competition among providers, spurs choice, encourages delivery at a lower cost than through traditional state-run schools and, above all, improves quality. Whether these outcomes have been achieved is debatable

(Molnar and Garcia, 2007). Clear though is that in many countries governmental policy preferences of recent decades have increasingly leant towards neoliberalism: 'a breaking down of education as a public sector monopoly' (Robertson, 2008:12), exposure to the 'burdens of economic uncertainty' (Crouch, 2009:5) and the introduction of a business-like imperative to educational management (Black, 2005). The resulting shifts in the professional context of school leadership and of what it means to be a professional within the public sector have been the subject of countless academic journal articles, books and thesis.

However, while managerialism may have been extensively critiqued, this study's focus on *international school* Heads, and the resultant ability to bracket out regulatory influence, differentiates it from previous works. Literature focussed on Western contexts is an important starting point (and, albeit with limits, an important comparative) but, as private entities, international schools are largely free from governmentally derived managerialism; they are also not newly exposed to business-like imperatives and, as this study discovers, the economic forces they face are not that uncertain at all. Thus, extrapolating from the extant literature, it is on this basis that international school Heads' attachments to professionalism, in both educational and managerial form, are suggested as more revealing lines of analysis. Managerialism is resisted and moderated and managerial behaviours embraced by international school Heads as they undertake identity work, not primarily in response to exogenous demand/regulation, but more so through engagement with plural and contingent discourses - a focus on *discourse*, without the muddying influence of *directive*, thereby more clearly revealing the imbrication of the manager-subject in the processes by which they are governed. This does not preclude the possibility that school leaders in both state and international school contexts may be governed by similar influences (whether resistive or accepting of managerialism), but it does encourage a more nuanced analysis of *why* managerialism might be find its way 'inside' international school leaders.

This perspective is important because, as the literature suggests (Oplatka, 2003; Hargreaves and Goodson, 2006; Fullan, 2009; Bush and Glover, 2014), Heads are central to school improvement. Showing how these important professionals navigate contested educational and managerial terrain is, therefore, vital to understanding not only the work Heads must do on/for their schools but also, to be successful in that undertaking, the work that they must do on (or, through discourse, is done to) their selves. After Peck (2003; in Ball, 2012a:29), managerialism may be ‘out there’ (regulatory and economic) but this work argues that more (or at least as) important is the extent to which its discourses find their way ‘in here’, inside the hearts and minds of educational professionals who are being encouraged, required and/or seduced to act managerially.

In particular, a position is established whereby individual professionals are not reduced to mere subjects or given unbridled agency. Rather, they are seen to be institutionalised into various types of professionalism through which identity is created, affirmed and assured. From this stance, it is argued that educational discourse offers powerfully affirming potentials, marking the subject as ‘educationalist’. Equally though, despite ready critique (Bush, 1999; Ball, 2003a, 2012, 2015), managerialism is also found to offer seductive opportunity for the manager-subject; it affirms and reifies a Head’s identification as ‘manager’. In these terms, the ‘old’ versus ‘new’ professionalism debate (Dent and Whitehead, 2002) may not be as relevant as it once was.

Through a mixed-methods approach – an online questionnaire, recruitment documentation review and face-to-face interviews – the data collected for this thesis reveals the emergence of a third generation of professional. This professional is not untouchably autonomous but nor are they stifled and threatened by high-stakes measurement and monitoring, rather this professional is someone who is encouraged and supported by the relationships of power within and between educational and managerial subject positions. What emerges from this analysis is a re-professionalisation of school leadership, not as old or new, but something newer still – as hybridic.

Finding recent attention, particularly in health care (Skelcher and Smith, 2015; McGivern, Currie, Ferlie, Fitzgerald and Waring, 2015; Denis, Ferlie and Van Gestel, 2015; Spyridonidis, Hendy and Barlow, 2015; Currie and Croft, 2015; and Croft, Currie and Lockett, 2015) the concept of hybridity examines how individuals reconcile the opportunities and threats of complex institutional contexts. Within hybridity there is opportunity for individuals to configure legitimated identities that cross-cut professional and managerial discourse; a discursive space in which the production of 'docile bodies' (Foucault, 1977:136) through disciplinary practices is challenged. The analysis thereby provides a contrast to, and develops understanding from, previous studies which see the professional and the manager as opposed (*cf.* Elliott, 1996; Randle and Brady, 1997; Clarke and Newman, 1997; Bush, 1999), instead exploring ways in which hybrid subjectivities are worked at by professionals governed by the demands of plural discourses, occupationally and/or ontologically.

With little currently known about the antecedents of developing hybrid identities within education, the outcomes for identity work/identities and, in turn, what this does for notions of educational leadership, it is here that this study makes its most substantive contributions. Extending research from other fields (health care, primarily) it is shown how educational leaders are governed by discourse into hybrid subject positions, how hybrid identity work might be identified and, for the individual professional, how the benefits of hybridity might be realised.

Connecting these findings, and itself a contribution to knowledge, are the relationships established between identity work and institutional work. Through use of Lawrence and Suddaby's (2006) taxonomy, this thesis shows how the disciplining influences of discourse govern schools and Headship (*institutional work*) and versions of each individual's own self (*identity work*). The types of institutional work Lawrence and Suddaby describe - *mythologizing*, *educating* and *policing*, for example - are shown to represent (and to allow researchers to recognise) various 'technologies' that

individuals use as relationships of power play out between self, within and between selves, and within and between selves and institutions.

Although arrived at by bracketing out regulatory influence, these outcomes may potentially resonate with school leaders in a range of contexts, not just those in *international* schools. National and international schools may be separated by geography, by the differing authorities of government, and by different *raison d'être*, but that does not preclude Headship, internationally *and* nationally, being influenced by the discourses which govern the identities of those who would wish to attach their *selves* to that title.

At the same time, there is no intention to reduce analysis of the role of hybrid managers to one that aligns with a contemporary educational paradigm which is overly managerialist. Instead, the attempt is to establish a position which recognises the value of hybridity as a means of moderating, for self and for school, managerial influences without forsaking the benefits of management identifications and the benefits (however contestable) of managerial practice without succumbing to its extremes. This makes the outcomes of this study valuable to aspiring and serving Heads, to school recruitment panels, to policy makers developing competency frameworks and Headship qualifications, and to academics researching hybridity across various educational (and non-educational) contexts.

1.1 STUDY OUTLINE

The analysis which follows is framed by three research questions:

- I. What forms of managerialism, if any, are emerging within international schools which might exemplify the antecedents of managerial identities?
- II. Which discourses, educational and/or managerial, seem dominant in the processes of identity formation for international school Heads?
- III. What are the outcomes, in terms of their professional identity work, for international school Heads as they reconcile the plural demands of education and managerialism?

At the outset, it is important to clarify that, while the context of this study is the international school, neither the schools themselves nor their 'international' status are under analysis. Critical engagement with what international schools actually are (and the task of distinguishing them from national schools) is undertaken below, however the field of study is Headship, its modes of professionalism and the professionals (Heads) who are governed by its discourses.

Also important to note, the site of study is the *manager* - the international school *Head*. This is not a study of hybridity in relation to practitioners required to undertake some element of management (as in the nurse-practitioners studied by Croft *et al.*, 2015). Nor is it a study of state-sector teachers being exposed to managerial influence (that ground covered by, amongst others, Stephen Ball; 2003a, 2012, 2015). It is a study of former practitioners (teachers) who now hold formal and designated management positions (Heads). The use of literature dealing with public education and, indeed, managerialism as experienced across other contexts, is argued as valid and appropriate because the interest of this study is in unpacking the disciplinary work done by and done to Heads not by policy but through *discourse*. That is, whilst the extant literature on managerialism is heavily focused on workforce redesign, on the redesign of work, on the redesign of structures and on the redesign of status and power relationships for those who work in state

contexts (Hood, 1991; Gewirtz, Ball and Bowe, 1995; Hoyle and Wallace, 2005; Ball, 2003a, 2012, 2015) the outcome of much of this research, Ball's work in particular, is how these changes affect the professional not just at the level of practice but also how they affect subjectivities. Contribution is made, therefore, via understandings of how discourse constructs the professional manager-subject – and for this the effects of managerialism on other professionals in other (educational and non-educational) contexts, and a consideration of whether these effects transfer to international school Heads, has proven instructive.

Heads themselves provide an illuminating context through which to explore identity work and the interrelationships with professionalism for two reasons. First, they attach significance to 'traditional' educational subjectivities, identifying with values such as 'caring, human nurturance, connectedness, warmth and love' (Hargreaves, 1994:175). Second, the introduction of a business-like imperative to education is widely reported to be conflicting with these values (Ball, 2003a, 2012b, 2015; Black, 2005), bringing identity transitions to the fore. These conflicting influences thereby provide a rich site of enquiry for how Heads are governed, possibly negatively but also positively, as subjects of two powerful discourses – educational and managerial.

Commitment to discourse as a mode of analysis emerges (and emerged for me as researcher) from an epistemological and empirical position, informed by literature review (Chapter 3) and data analysis (Chapter 5), which finds the connection between management and managerialism to be misrepresented, overstated or, at best, under-researched. Also overlooked is that, by definition, the manager is required to engage with management. As will be discussed (Chapter 3), in current literature *management* is often (overstatedly) conflated with *managerialism*, all forms of which seem fair game for critique. The position of this study, however, is that management (as a necessary function of organisation) needs to be distinguished from managerialism. Moreover, it is found that managerialism may not always be the anathema that much of the prior research has it

to be. It can and undoubtedly does have negative influences, but not unequivocally. It is both sides of this equation, the positive and the negative, which are addressed here.

Managerialism was chosen as the focus because, as a manager-subject myself, it has particular personal resonance (see below). Furthermore, although prominent in Western literature, little attention has yet been given to managerialism in international schools – a significant omission given that the context allows for examination of *discourse* as opposed to *directive*. Other discourses, the status quo discourses considered by Thomson, Hall and Jones (2013) - delivery of curriculum, subjects as the organiser of curriculum, ability and low aspirations – would each, for example, have offered alternate lens. These topics were discarded though because of the aforementioned misrepresentation of managerialism and, at the risk of heresy, the underrepresentation of its potentials for the *manager*-subject. Addressing managerialism more readily problematises how Heads reconcile contentious but also empowering discursive influences; discourses that, for better and worse, construct what it means to be a former practitioner now required to manage (their organisations and their own selves).

With that said, it is pertinent to highlight that no position is taken on whether managerialism improves *school* outcomes, efficiency and quality. Indeed, no such commentary was possible. As voluminous literature attests (Stoll and Fink, 1996; West-Burnham, 1997; Macbeath and Mortimore, 2001; Bush and Bell, 2002; Bush, 2011), school quality is a slippery and contested concept; that nebulosity applying all the more so to international schools. Given the variable types, forms and purposes of international schooling, and with private ownership making data difficult to source, there is little or no reliable data and no academic literature which deals with international school quality beyond anecdotal or small-scale localised case studies. Certainly, no benchmark exists with which schools could be accurately and fairly compared and, therefore, the effects of managerialism measured. However, in a study focused on identity work no such

comparison was intended or required. Under focus is not what managerialism does *to schools* but what managerialism does to, does for, how it is done by, and how it does the *professional manager-subject* (the Head).

1.2 EXPLANATION OF TERMS

In order to construct a coherent argument, strategic choices have been made about definitional and theoretical positioning. In addition to fuller analysis in later chapters, those definitions and theoretical positions are now briefly outlined.

1.2.1 Distinguishing between Management, Managerialism and Commercialism

While it is impossible to entirely separate management practices from managerial ones (and, in the case of for-profit schools, perhaps even from commercial ones), I argue that extant literature underserves the differences – especially as related to the identity work of managers. This is not to say that attempts at differentiation have not been made. Indeed, Stephen Ball (2003a) commits several pages (p217-219) to describing the ‘policy technologies’ behind managerialism, and in a 2015 paper he examines its specific implications for a small sample of serving teachers. He does not though deconstruct which practices may be considered necessary management and which might be more obviously informed by managerialism – and thus whether a manager might be argued to be simply doing what is necessary to administer an organisation (*management*) or acting more managerially (practice, and perhaps even identity, informed by *managerialism*). Perhaps this somewhat abstract positioning is because no distinction can be made, any attempt to do so superfluous; management, managerialism and commercialism too taken-for-granted, and the lines too blurred, for them to be separated. The position here, however, is that Heads (as managers) are, by definition, required to engage with management. If one is to understand how

managerialism affects managers and how Heads might act *managerially* it must, therefore, be separated (as best as possible) from management and from commercialism.

On that basis, adopting the stance of Cunliffe (2009), *management* is used in this thesis to refer to the technical, functional and arguably necessary practices of administering an organisation. That is, taken as practice, as Watson and Harris (1999) suggest, management is the necessary outcome of any work organisation (financial, human resource and operational requirements, for example). Used as a collective noun, management also refers to the groups of people who do the managing. In turn, *managing* relates to 'getting things done through other people' (Grey, 2013:58) and *managers* are the individuals who engage, occupationally, in these activities.

Managerialism references discursive constructions which sharpen, extend and prioritise what types of administrative activities are undertaken, who is responsible for them and for what purpose/s they are carried out (Deetz, 1992); those *discourses*, informed by neoliberalism, being performativity (Lyotard, 1979; Ball, 2003a), marketisation¹ and corporatisation². Managerialism, as Bush suggests, is management to excess and potentially 'at the *expense* of educational purpose and values' (1999:240 *emphasis added*).

Building on this position, the term *managerial* is adopted throughout this thesis to refer to enactments of managerialism; that is, the individual manager's positive or negative orientation,

¹ Marketisation refers to granting schools independence from government and the related ability of parents to make choices about which schools to send their children to. These independence and choice aspects of marketisation are related in the sense that school choice is more meaningful where individual schools have the ability to differentiate themselves on features of the educational experience that parent's value. Schools come to need to market their differences, to analyse their place in the market and to react to market forces much as a business might (Hicks, 2015).

² The concept of 'corporatisation', the opening up of public education services to private sector participation on a for-profit basis (Soley, 1995; Readings, 1996; Meyer, 2002; Ball, 2007), does not readily transfer to international schools. These schools, whether for-profit or not-for-profit are, by necessity of the laws of the countries in which they operate, already *private* entities and cannot therefore, legally or technically, be corporatising. Any change in the way these schools are run is not then about changes in legal form (independence from State); it may, for some schools, be about commercial thinking (resultant of for-profit motivations) but that does not explain the seemingly stronger influence of managerialism within not-for-profit schools (see Chapter 5).

through word or deed, towards managerialism. If managerialism is the noun, managerial is the adjective – it describes the *doing* of managerialism. Thus, to act *managerially* (to be *managerial*) is to adopt, to use as regulation and control, and in the context of this study, to identify with, managerialism and its associated technologies and practices. These include: Programme for International Student Assessment (PISA) league tables, school inspection regimes and a proliferation of comparison websites, mechanisms and benchmarks (Ball, 2015); ‘credentialism’ (Hoyle and Wallace, 2005:101); enthusiasm for the measurement of consumer value, usually through pupil testing (Weinberger, 2007); fixed-term contracts, accountability to performance metrics, performance related pay and benchmarking (Hood, 1991; Gewirtz, Ball and Bowe, 1995).

Commercialism refers to activities focused on earning profit for individual owners and shareholders (Bush, 1992; Herzlinger, 1996; Black, 2005; Deem, 2011), the trading of goods, services and knowledge for the explicit purpose of financial return (i.e. the original, if now somewhat dated, meaning of *commerce*).

These brief discussions provide an initial outline of how management, managerialism and commercialism thinking might be separated, Chapter 3 explores and develops these arguments further.

1.2.2 Identity and Discourse

Although this work details the incidence of managerialism in international *schools*, the critical interest is to explore its outcomes for the identity work of international school *Heads* – how managerialism, as discourse, acts on Heads as subjects.

Consideration of discourse has proven instructive (and necessary) to this thesis because, contrary to reductionist perspectives that see individuals as disempowered 'docile bodies' (Foucault, 1977:136) dominated, subjected and controlled by discourses, the literature suggests that those same forces are also found to be available for appropriation as individuals *work at* their identities (Ball, 2013). From this perspective, hybridity, as an outcome of identity work, emerges from processes of moderation, reconciliation, adoption and rejection of contingently dominant and subordinate discourses. This is a conceptually dense, but necessary, epistemological position; it is the working through of theories of identity (and thus discourse) which leads this thesis to, and opens up the possibility of, the hybrid subject – that subject finding professional and personal legitimacy across different discursive domains. Both identity and discourse are, therefore, central to this thesis and require initial clarification.

At its very simplest, identity is what a particular individual identifies *with* (and what they identify as *not*) – identifying as female and not male, for instance. Second only to a person's name, employment in one type of role or another is psychologically important in this process of identification (Jackson and Carter, 2007).

Discourse is commonly used to refer to 'inter-related sets of ideas and the ways of expressing them (Phillips and Oswick, 2012:10). Discourse in these terms is referring to concepts and ideas, the 'discourse of democracy' (*loc. cit.*) for example. A more strongly theoretical understanding of discourse examines the context of language and the ideas and social influences that such language draws upon *for* meaning and, most significantly, that it affects the meaning *of*. The difference here is that language is not merely describing, nor is it prescribing meaning, rather language acts to *construct* social phenomena. Discourse does not just manifest within society, rather it is discourse (through language and symbols) which governs society and individuals - discourses shape reality (Butler, 1993, 2005, 2015).

Discourses then are the means by which individuals come to know themselves, exercise power (in contrast to holding power), and through which they pronounce or deny the validity of particular knowledge/truths. Individuals *work at* achieving a sense of continuity, stability and purpose amongst an otherwise fragile and contingent existence *through* the relations of power between different discourses. It is this play of dependencies amid different discourses – interdiscursivity – which governs the subject.

Informed by the work of Michael Foucault, the notion of the subject (and subject positioning³) is integral to this work. This is not, however, an attempt to *discuss* Foucault, rather it is an attempt to *use* Foucault to understand, examine and interpret Heads' identity work. Performance-management, increased accountability, data-driven decision making and benchmarking (managerialism), and rhetoric such as a 'student first' morality (educational discourse) each prescribes a certain truth to Headship and are disciplining and *self-forming*. The subject is made up, constituted, within this double-bind (Ball, 2013). It is recognition of this double-bind that allows for the hybrid subject. Post-dualistic understandings of discourse cast human beings as agents who make choices while, simultaneously, *also* being subject(ed) to something or someone (Willmott, 1994). The subject is not entirely 'docile' but is able to make choices about its positioning in relation to discourse – the result is not a free subject but, rather, one who is *self-governed* not singularly, but into a range of *hybrid* subjectivities.

³ According to Davies and Harré's (1990) 'positioning theory', a *subject position* is created when individuals use language to negotiate social *loci* for themselves. As Burr (1995) explains: discourses provide us with conceptual repertoires with which we can represent ourselves and others; they provide us with legitimate ways of locating our sociality (our context and the persons within it). Subjects positions are, therefore, the socially constructed and legitimated identities available in a field (Oakes, Townley and Cooper, 1998).

The term Foucault uses to describe these processes is *subjectivation*. In her analysis of Foucault's work, Judith Butler (1997) asserts that *subjectication* (note the spelling change⁴) denotes both the becoming of the subject and the processes of governance. Subjectication is, therefore, the making of a subject, the technologies of governmentality⁵ according to which a subject is formulated, subjugated *and* authorised, through and by the relationships of power found across discourses.

This does, however, present research challenges. Examination may focus on the governance effects of specific discourses, here educational and managerial, but those discourses also intersect with other discourses – gender, ethnicity, sexuality and so on. A Head's identity will be governed not only by relations of power between educational and managerial discourse but also by relations of power within and between other discourses - that is, intersectionally⁶. A male Head might, for example, experience a very different form of subjectication in relation to managerialism than a female Head. Unable to remove these influences, the best a researcher can do is to be aware of the potential influences; to the extent possible bracketing them out, or where relevant, drawing reference to them. For instance, if it is indeed that managerialism governs female Heads differently to male Heads, this would be a valuable finding and an appropriate use of intersectionality.

⁴ The term *subjectivation* is interchangeably written across different literature as *subjectivation* (French) and *subjectication* (English) - the latter spelling being the one adopted here.

⁵ Moving the debate beyond a subject-agent binary, governmentality (a portmanteau of government, as control, and mentality, as cognition) is: 'how to govern oneself; how to be governed; by whom should we accept to be governed; how to be the best possible governor' (Foucault, 2007:88) – literally, the way in which the subject *self-governs* through the processes of 'discursive practice' (Foucault, 1970:xiv).

⁶ Intersectionality refers to the interaction of multiple identities and experiences (Davis, 2008:67). The term has gained most traction in feminist theory, there used in relation to oppression and domination on multiple and often simultaneous levels (the discrimination that might be experienced by a *black, female, lesbian*, for example). It can, however, be applied more neutrally to overlapping identities in other domains; the intersection of educational and managerial discourses and the type of subject such *intersectionality* produces, for example.

There is also an important methodological distinction to be made between analysing discourse as an end in itself and analysing it as a means to some other end. Some discourse analysis – linguistic studies, for example – is primarily concerned with describing the structures of socially situated language-use. As Thomson (2011: *no pagination*) suggests, this form of analysis addresses questions such as ‘How does turn-taking work in conversation?’, or ‘Does the form of a question affect the form of the answer?’. Other research, this work included, is more interested in what language *does* rather than what is said. Discourse here is the meaning that underpins language use, the purpose not being to study the discourse itself but, rather, to deconstruct what discourse does to and for the subject/s. Thus, again after Thomson (*loc. cit.*), questions become ‘What is being represented here as a truth or as a norm?’, ‘What interests are being mobilised and served by this and what are not?’ and ‘What identities, actions, practices are made possible, desirable and/or required by this way of thinking/ talking/understanding?’. The latter position is the one adopted for this thesis.

1.3 TERMS OF REFERENCE

To frame the terms of reference for this study, I define and demarcate below how the type of institution an *international school* Head leads has been treated.

1.3.1 Transnational Spaces: What Are International Schools?

If one conjures the image of an international school manager at work, perhaps the scene is one of palm-fringed beaches; perhaps it is of lazy days and long sunsets; perhaps it is images of grand colonial architecture, the manager’s routine punctuated by the thump of boot against ball, the thwack of leather against willow or the chimes of a stately clock tower. In all of these images, there may be some truth. There is also truth though in images of harried managers scurrying

through formless yet functional concrete edifices. Of overworked professionals awkwardly struggling with culture, language and dislocation. This is the varied, fascinating and complex world of the international school; a world of many truths.

According to Mary Hayden, a leading academic on international schooling, historically growing to meet insufficient capacity and insufficient quality in local provision, international schools were initially funded by benevolent locals or wealthy benefactors. Filled with the children of nomadic expatriates and the sons and daughters of privileged locals, these pioneering international schools were founded on the hopes and dreams of a select minority. Gateways to overseas universities and strongholds for the perpetuation of family wealth, the early international schools sought to import educational prestige and quality of provision; few were run for profit, few were corporately owned, and there were few of them (Hayden, 2011). More recently though, as the benefits of economic growth have percolated into the middle classes in many countries, these early schools have struggled to keep up with demand. Attracted by promises of safe and sustainable returns, entrepreneurs have scurried to enter the market. Ten years ago there were 2,584 international schools globally, at the time of writing there are 8,209 (ISC Research, 2016). From sole-proprietorships and partnerships, through international franchises such as those of Dulwich College and Harrow School, to the increasing presence of educational corporations such as Cognita, GEMS and Nord Anglia (who, at the time of writing, manage over 180 schools worldwide⁷) the breadth of international school ownership now mirrors the scope of curricula offered, students taught and markets served.

⁷ Data sourced from each of the various organisations websites at the time of submission.

Perhaps because of this rapid growth, there exists no universal definition of what an international school actually is. With the title 'international' open for any school to adopt as they see fit, with no restriction upon its use (Murphy, 2000; Walker, 2004), and no single organisation granting rights to the term (Hayden, 2006), the variety and range of international schools is enormous. Even earlier research, undertaken when international school numbers were much smaller, highlighted the extent of diversity (*cf.* Leach, 1969; Sanderson, 1981; Pönisch, 1987). As Blandford and Shaw (2001:2) summarise:

“In terms of phase, size and sex, international schools defy definition: they may include kindergarten, primary, middle and upper, higher or secondary pupils, or incorporate all of these in a combined school; they may range in [student] numbers from twenty to 4500; they could be coeducational or single sex.” (Blandford and Shaw, 2001:2)

Resultant of these various interpretations (and the numerous motivations for adopting ‘international’ nomenclature⁸) various academics have taken up the definitional mantle and have endeavoured to classify international schools. Sylvester (1998), for instance, proposed two main groupings of international schools in relationship to their underlying missions: ‘encapsulated’ (with little diversity of student cultural background or pedagogy, a narrowly targeted curriculum and a value system arising from an imported school culture) and ‘inclusive’ (wide diversity of student cultural background, teachers as exemplars of world-minded views, a balanced formal curriculum and encouragement for students to explore diversity).

⁸ Most obviously these motivations are commercial, the term ‘international’ conveying status and prestige in the market. Other motivations include a philosophical alignment to international education and the more pragmatic adoption of the title to avoid State-directed regulatory control.

Synthesising a variety of research, Hayden and Thompson (2008) develop this thinking showing (at least at the time their work was published) how international schools differ from their national counterparts:

“Curriculum: they invariably offer a curriculum that is other than that of the host country in which the school is located.

Students: their students are frequently non-nationals of the host country (though more recently, increasing numbers of such schools in some countries are catering largely for children of affluent host country families).

Teachers and administrators: they tend, in many cases, to be staffed by relatively large numbers of expatriate teachers and administrators”. (Hayden and Thompson, 2008:28)

Writing in the same year, Lallo and Resnik further expand these distinctions, suggesting that international schools are:

- “schools catering to students from different nationalities;
- schools catering for different nationalities, encouraging the development of a particular language and cultural identity (a British international school, for example) while promoting a ‘transcultural identity’ for all students;
- schools serving students of a specific national community located in a foreign country, operating separately from the local school system (the *Lycée Français International de Bangkok* in Thailand, for example);

- schools for whom an international orientation is used as a guiding philosophy of their educational work (the United World Colleges, for example).” (Lallo and Resnik, 2008:171)

The reductionist nature of these typologies and checklists has, nonetheless, been overtaken by events. Immediately clear to anybody with a passing knowledge of international schools is that many are now heavily populated with local nationals, not expatriates, and that not all offer an international curriculum. ISC Research reports, for example, that in 2015, 80% of international school students were local nationals and, in a curious oxymoron, that 40% of the world’s (so called) international schools offer the UK National Curriculum. Therefore, rather than binary distinctions, types and typologies, it is perhaps better to conceive of international schools as ‘always in process’, their *raison d’être* always shifting and the populations they serve ever-changing. They are a spectrum of institutions, variously titled ‘international’, which serve the multiple needs of diverse populations through diverse curriculums and in diverse locations – institutions that may share the title ‘international’, but, perhaps, little else.

That said, to offer a degree of technical clarity to the terms of reference for this study, it is to be understood that here an ‘international school’ is one which provides a private fee-paying education, undertaken in schools declaring themselves ‘international’, attended by students, full-time, who study a curriculum (at least in some substantive part) that is not of the country in which the school is geographically located. For the most part, this education will be in English, though also included are French, German, Swiss and an increasing number of bilingual schools which deliver lessons in their own national language and not only in English or in the local language where the school is located.

For the purpose of this thesis, excluded from analysis are international universities, crèches, and language centres. Whilst some crèches claim international status, such facilities are excluded as, often, they are not attended full-time and because, in the purest sense, they offer pre-school childcare as opposed to the more formal education offered from kindergarten and beyond. Similarly, language centres are excluded because most students attend such institutions only part-time (usually after attending day school elsewhere) and are, therefore, an addition to schooling and not a substitute for it⁹. More problematic is the question of state-owned schools, and particularly those that offer an international stream or international educational component. It is possible to argue that a State-provided international education may, in essence, be little different from a privately provided one and therefore that such schools operate in the same field as international schools. However, whilst this may be true in theory, the reality is that in many countries where international schools are common State education does not (yet) offer a viable alternative to a privately provided one. Indeed, as noted, one of the key drivers of international school growth in many countries (particularly those with emerging economies) is poor State provision. These schools are therefore also excluded.

Accepting that typological distinctions are rarely discrete or incontestable, and although subjective and dynamic, at the time of writing the 'international school' market includes (ISC Research, 2016):

⁹ As an aside, and as an example of how messy and amorphous the notion of international schooling is, what of the 17-year-old student attending a language centre full-time, perhaps undertaking a language preparation course in readiness for university? Should students on such programmes be counted within the boundaries of international school education? Whilst there may be an academic argument for their inclusion here the more pragmatic view is taken that because such institutions usually describe themselves as *language* schools and make little pretence towards international schooling, instructed by the notion of self-identification, these students are considered to belong to a distinct (whilst overlapping) industry.

Overview

8,209	Schools
4,249,756	Students
392,016	Staff
238	Countries

School Size

1000+	1,174	(15%)
500 – 999	1,339	(17%)
250 – 499	2,090	(26%)
100 – 249	2,236	(28%)
0 -99	1,157	(14%)

School Orientation¹⁰

UK	3,675	(20%)
US	1,973	(11%)
International	3,650	(20%)
IB	1,728	(10%)
Bilingual	2,400	(13%)
Other	4,534	(25%)

For-Profit	80%
Not-For-Profit	20%

As a final note, despite this definitional wrangling, it is worth reiterating that international schools are not the site of study, they are merely the context. The site of study is the Head, the setting in which she/he works being an international school; the particularities of this type of school allowing a bracketing out of regulatory induced managerialism.

1.4 RESEARCH DESIGN

This study is situated within interpretive traditions and, in keeping with this stance, for two of its three research components, adopts a Critical Discourse Analysis (CDA) approach. The justification for adopting this approach was that simply reporting managerial practice quantitatively, although relevant and useful, fails to account for the role of identity work in the moderation of

¹⁰ Note that some schools offer more than one curriculum type and, hence, the total here equals more than the total number of individual schools.

professionalism. While incidence of managerial practice is recorded, the purpose of this data is to serve analysis of the discourses on which Headship is based and the relationship between Heads and these practices. The difference, in brief, being that Heads identifying with managerialism will celebrate its language and practice, whereas those identifying against might denounce or bemoan the same.

This approach required the adoption of mixed-methods: firstly, to capture (and enumerate) possible antecedents of identity work in terms of managerial practice, an online questionnaire was used to gather the views of Heads and senior leaders in international schools in South East Asia; secondly, and examined through critical discourse analysis (CDA), recruitment documentation for recently advertised international school Headship positions was reviewed; and finally, the substantive heart of the research took the form of face-to-face interviews with international school Heads. These three methods, each related to specific research questions, generated the following research data:

Online questionnaire: Examination of 150 responses to an online questionnaire designed to establish the incidence of managerial practice and/or language within the sampled schools.

Recruitment documentation review: Analysis of 100 sets of recruitment documentation for Headship positions in international schools and three interviews with recruitment consultants (the data from these interviews used to sense-check and enrich the documentation analysis).

Used to address Research Questions I and II, these methods helped to establish the extent to which educational and/or managerial practices and discourses feature in the external construction and governing of Headship. Finding managerial discourses in job descriptions and person specifications would, for example, suggest that Heads' identity work is *reactively*

governed by these influences. Conversely, a lack of such requirements would suggest that managerialism might be more deeply embedded, internally and *proactively* empowering Heads as part of their identity work.

Interviews: Addressing Research Question III, the primary research component of this work comprises twenty-five face-to-face interviews with international school Heads. Where the online questionnaire and recruitment documentation review helped to determine the extent of institutionalised managerialism, these interviews sought to determine how Heads' individual identities are constructed through or against these discourses. The stance of this thesis is that the language Heads use when describing their selves and their role and, as importantly, the *ways* in which that language is used, offers an insight into how the manager-subject is formed in response to plural, contested and changing discourses which govern professionals and professionalism.

The challenge of researching international school Heads is, of course, that they are to be found, by very definition, in globally diverse locations. Aside from conferences where Heads congregate (a less than ideal research setting), accessing Heads requires a travel budget beyond most researchers. This possibly explains the lack of scholarly focus on these subjects. They are difficult and expensive to reach. However, during the research phase of this thesis, I was in the fortunate position of being a frequent traveller, with that travel taking me to international schools¹¹ and putting me in direct contact with international school Heads.

¹¹ At the time of the research I worked as a Business Development Manager for a franchised international school group. This position required travel to cities across Asia and afforded access to Heads in a range of contexts and locations. In all cases this research was undertaken mindful of conflicts of interest, though no Head declined from being interviewed because of any such concern.

1.5 MY RELATIONSHIP TO THE RESEARCH

The path of intellectual enquiry leading to this PhD was laid at an early age. At GCSE, Business Studies was my favourite subject; ditto at A-Level. A Business degree initially led to corporate management training and thereafter, struggling with the vacuous nature of the corporate world, to a career in education as a Business Studies teacher. That career change was followed by a swift rise up the ranks of educational management, a raise bolstered by the study of an MBA.

This thesis is, therefore, one with considerable personal resonance. I have been a student of business my entire life and a manager for most of my working life. Given this background, my subject position has always been supportive of business thinking. Yet, as a result of the critical insight afforded by postgraduate study, I find that position now changing. My time as an educationalist has softened my commercial stance, and my academic research has encouraged me to critically reflect on previously held conceptions of what it means *to be* a manager. My subject position today is one that understands management and is motivated and inspired by it. That position is, however, now also more critical, or at the least more questioning, of the role of managerialism in education. This section is an exploration of how that subjectivity has informed, affected and guided this study.

1.5.1 Who Am I?

The bulk of my formal (and formative) education occurred during the 1980s and 1990s – a time of Thatcherism, Yuppies and conspicuous capitalist consumption. It is arguably no great stretch to suggest a strong connection between my own identity and the growth of neoliberalist ideology as forces of change that characterised a significant portion of my youth (and continue to characterise my adulthood).

The majority of my educational career has been spent in private or for-profit schools. Throughout my career I have been a self-declared believer in the power of market forces. Indeed, my desire to undertake an MBA and my initial conception of how this PhD might contribute to knowledge related to how schools might benefit from business thinking. Moreover, as an educational manager, the strengths of my “management approach”, my “corporate style” and my “business thinking” have always been applauded. I not only identified as a manager, I was, by all accounts, seen as a very successful one. Indeed, this managerial identification, and my management knowledge, recently resulted in a move from school-based management to a Business Development Role with a for-profit company in charge of a portfolio of international schools – my role being feasibility analysis, economic modelling and management of new school start-up processes. In other words, I have long since identified with, benefitted from, and been a manager.

However, subsequent to undertaking Keele University’s MBA, and resultant of the identity work required to complete this PhD, I have come to question academically and ontologically what management actually means for me and for those I manage. When faced with papers such as Ball’s *‘The Teacher’s Soul and the Terrors of Performativity’* (2003a) and when exposed to the wide range of literature which argues that teachers and Heads are no longer seen as highly educated professionals, it is difficult not to question the implications of managerialism. Thus, through the more critical lens that higher level academic study has afforded me, I now look at what it means to be a manager, and at myself, with different eyes. That is, even for someone with a business background, the application of managerialism within education brings to the fore questions of identity. If the role of the educational leader is indeed changing, is indeed becoming more managerial, what are the implications for individuals whose identities are bound up with a form of professionalism that is being asked to accommodate potentially competing discourses? Just as asking these questions motivated this study, I have needed to reflect on the same questions *myself*.

From this *self*-questioning has been drawn my interest in and commitment to poststructural theory and to an exploration of ontology¹². As the above implies, adopting such a reflexive stance required me to subject my own knowledge claims to analysis. Thus, whilst commencing the journey as an advocate of business thinking, my doctoral research ‘unsettled’ preconceived notions I had about management, requiring me to view myself as a manager through a different lens. Cognisant of Critical Management Studies (CMS) attempts to destabilise the ideologies of management, despite what my former managerialist self may have believed, this thesis takes a critical view of neoliberalism and of management, attempting to surface pressures for measurability. It also seeks to reveal the deeper ontological processes that drive the human decisions behind ‘management’. In other words, it looks beyond the rationality of organisations as management science sees them towards an analysis of how individuals experience organisations. This turn has involved ‘risky’ territory, not least of all for my own ontology – the implications of which are returned to in Chapter 6.

In sum, the self that writes this sentence is much changed from the self that began the PhD process. I have developed from a positivist position to a more critical one, and my epistemological commitments have shifted to discourse and to the centrality of identity work in the structuring of organisations. I am still a manager and I am still engaged with management practice but I now bring new subjectivities, new knowledge and new priorities to the related identity work. This thesis should therefore be read as the work of a manager, but as someone who is no longer just a manager – I, like my research participants, am a hybrid; a blend of intersectional, fluid and shifting subjectivities.

¹² As used throughout this thesis, ‘ontology’ (and its various derivatives) is taken to refer to ‘the science of being’ (Le Poidevin, Simons, McGonigal and Cameron, 2009) - the tools, techniques and tensions inherent in the journey of self. Adopting a poststructural epistemology, it is taken that ontology is a process, never an outcome. Individuals attach to ontologies which (seemingly) render the self as real, to its self and to other Selves, but, as Elliott (2008) reports, it is the discourse(s) governing that ontology that serve to construct the self, not some essentialist and innate persona.

1.6 SUMMARY

This study is a critical examination of the professional identity work of international school Head teachers in response to the plural demands of education and managerialism. The micro-processes of professionalism are explored and shown to be products of discursive practice, its reproduction, interpretation and re-shaping by hybrid subjects involved in both institutional and identity work.

The analysis proceeds, in Chapter 2, through an exploration of the context of international schooling. As the chapter establishes, in contrast to findings (in Western literature) suggesting changes in professionalism which result from marketisation and from a businessing of education (corporatisation), the 'burdens of economic uncertainty' (Crouch, 2009:5) have not been *newly* distributed to international schools, and the growing demand for international schooling results (for some schools) in market pressures being tempered (not strengthened) by economic forces. These powerful dynamics may have created the spaces (cultural, social, legal and economic) in which international schools exist but the widely reported influences of these dynamics on Western schools do not transpose simplistically or deterministically. In the context of international school leadership, the extent to which managerial identifications (or rejections) are solely a *reaction* to the influences of imposed and external direction or regulatory force is, I argue, contestable. Hence, in order to develop theoretical and practical models about whether and how these particular educationalists remain firmly grounded in their unique dedication to the common good and/or whether they are (also) subjects of the assumed virtues of being managerial, which make that discourse so powerful, it is useful to bracket out regulatory and economic influence.

With those influences filtered, it became possible to more authentically analyse the governance properties of educational and managerial discourses. That analysis is undertaken, in three parts,

by way of literature review (Chapter 3). Firstly, consideration is given to managerialism, its pressures and appeals. Secondly, through examination of the politics of self, the chapter analyses the processes of identity work and therefore power, subjectification and ‘technologies of self’ (Foucault, 1988). Thirdly, through an analysis of professionalism. The chapter explores the ways in which professionals come to identify with particular norms, cognitions and behaviours (here educational and managerial) and, through institutional work, how they attempt to shape their schools and Headship itself. The chapter concludes with an examination of hybridity as an outcome of identity work, which assists subjects in responding to the dynamics of complex institutional environments.

Chapter 4 is an examination of the methodological stance of this thesis and an analysis of the research methods undertaken – an online questionnaire, recruitment documentation review and face-to-face interviews. The results of this research are reported in Chapter 5, the data analysis. Here it is found that managerial requirements sometimes sit in tension and sometimes in balance with educational practice and discourse. With a clear need for Heads to be concerned about academic performance (output), fees (revenue) and pay and conditions (costs) there is evidence that Heads are accountable for more than one type of bottom-line – the educational, the financial and the intangible core (MacDonald, 2009). The Head may always have been required to undertake management but, the data analysis finds, they are now being encouraged, cajoled and seduced (not least of all by their own identity needs) to adopt subject positions that blend *both* educational *and* managerial discourse; the result being hybridity. The final chapter (Chapter 6) draws together these themes and findings, offering concluding thoughts and contributions to theory.

In summary, this thesis argues that managerialism *is* affecting the identity work of international school Heads. Those influences are revealed as contestable and equivocal, and educational discourse is shown to remain dominant, but it is argued that (to varying extents) managerialism has found its way inside the hearts and minds of these educational professionals. Subjectivity is recognised as the key site of managerial governance; resistance against and, importantly, empowerment via its various discourses requiring important identity work. The concept of hybridity, critiqued and extended throughout this thesis, offers a view of how this difficult, complex and conflicted identity work might be undertaken.

With Chapter 1 having outlined a focus on identity work and discourse, this chapter further justifies that position by critiquing the extent to which some of the central arguments of managerialism – primarily marketisation and corporatisation and the related influences of market forces – apply to international schools.

This justification is achieved through an analysis which finds moderating influences on the economic environments in which international schools operate. In opposition to the argument, most often touted in relation to Australian, US and UK maintained-sector schools, that the regulatory regimes which (now) expose schools to (quasi) market forces have resulted in a ‘businessing’ (Black, 2005:2) of school leadership, it is found that those forces do not appear to act similarly on international school Heads. Resultantly, the chapter problematises the deceptive trope that international schools are businesses and that Heads must, therefore, act (and *be*) like business managers. Deconstructing that premise offers a rationale for bracketing (though not entirely removing) commercial and market factors as an influence on international school Heads identifications, thereby establishing discourse as the more appropriate epistemological basis of subsequent chapters.

2.0.1 Globalisation: The Driver of International School Growth

It is beyond the scope of this thesis to fully explore what Appadurai calls the many ‘complex, overlapping [and] disjunctive’ (1997:326) interpretations of globalisation. It is undeniable though that ‘we are being propelled into a global order that no one fully understands, but which is making its effects felt upon us all’ (Giddens, 2002:7). While some interpretations see globalisation as essentially a force for good, arguing that the opening up of new markets, the

extending of competition and the bringing together of nations increases prosperity for all, other interpretations set globalisation in much more negative terms. Critics of globalisation see the so-called 'mobility turn' (Urry, 2003:157) as a source of ill, the route of increasing inequality, social dislocation and a neglect of the civic good. Globalisation is also seen as inescapably allied to the values of capitalism and to Western liberal ideals of 'modernity, progress, freedom, civilisation and reason' (Phillipson, 1992 in Hayden, 2006:163). Thus, as Bottery (2004) claims, while the local is not always an unalloyed good, with the potential for insularity and parochialism, in a world of Western leaning globalisation we find a leaching out of the local and the personal and an emerging paradigm with the potential to weaken community and undermine profoundly held beliefs - a world, as numerous global tensions evidence, ripe for conflict.

Whichever side of the globalisation debate one sits, globalisation and schools are intrinsically linked. Though it remains the case that state-sponsored education responds to and serves the needs of individual *national* economies, it is impossible to ignore the extent to which schools are influenced by *global* pressures. As Hayden notes:

“Even for those school-age students today who will never in adulthood leave their native shores, the future is certain to be so heavily influenced by international developments and their lives within national boundaries so affected by factors emanating from outside those boundaries that they will be hugely disadvantaged by an education that has not raised their awareness of, sensitivity to and facility with issues arising from beyond a national 'home' context.” (Hayden, 2011:212)

Notwithstanding a very few outlying mono-cultural 'areas of education, such as some school curricular systems...which are either unaffected by the forces of globalisation or actively resistant to them' (Coulby, 2005:25)¹³ school-level education is 'increasingly enmeshed in worldwide systems and networks of interaction' (Held and McGrew, 2000:3) that represent and result from globalisation. According to the World Bank:

“By 2030, 1.2 billion people in developing countries – 15% of the world population – will belong to the 'global middle class', up from 400 million in 2005 ... This large group will...aspire to international levels of higher education” (World Bank, 2007:xvi)

Resultantly, where once curriculum content was selected through national criteria and resulted in the reproduction of socio-cultural difference (Bourdieu, 1977), recent developments in global social, cultural and economic interconnectedness and interdependence have led to national education systems becoming increasingly *internationalised*. As Cooke suggests:

“National education systems increasingly promote an internationalisation agenda...while the growing profile of concepts such as global citizenship education [affect] the extent to which [students] are prepared for an 'interconnected world'” (Cooke, 2008 in Hayden, 2011:212)

¹³ Notably the example referred to by Coulby, Japan, has more recently introduced an internationalisation agenda to its State-education system (Stromquist and Monkman, 2014). To find such mono-cultural systems today one is forced to look at increasing outliers such as North Korea and at Iran, Iraq and Afghanistan, for example.

Such considerations are not though an exclusively 21st century phenomenon. International education may have found energy in the wake of globalisation but ‘international initiatives in education existed before anyone was discussing globalisation’ (Shields, 2013:63). What is new are the perspectives and possibilities that globalisation brings to modes of educational delivery.

Structurally and ideologically, international schools are one such possibility; other possibilities, as reported by Hayden (2011), being the adoption of international elements within Nation-state curricula (an increasing phenomena) and/or the offering of non-state based qualifications (Singapore’s use of the University of Cambridge Local Examinations Syndicate O-Level is one example). However, set against austerity measures and fiscal tightening, many governments can no longer afford to own (nor, as will be discussed below, do they politically favour the ownership of) the mechanisms of public and merit good provision. Thus, privately funded international schools offer governments a pragmatic solution to the need to provide international education and a response to the demands by the growing middle classes for quality educational provision. State education may remain the majority form, but international schools provide an efficient answer to the need for a country’s citizens to gain globally acceptable qualifications (the International Baccalaureate, for instance) and a financial solution to increasing school choice and quality without increasing fiscal expenditure¹⁴.

Resultant, then, from globalisation and the subsequent demand for international education, international schools represent a social, economic and governmental response to the needs of global capitalism. Central to this response are the decisions by a given country whether or not to embrace international schools and, then, whether to allow (or not) local nationals to attend those schools. These decisions are underpinned by political-economic ideology.

¹⁴ Such choice only exists, of course, for those who can afford international school fees; a fact which, though beyond the scope of this thesis, begs questions about the role of international schools in perpetuating the tendency of globalisation to accentuate inequality.

2.0.2 The Neoliberalist Agenda: The Ideological Space for International School Growth

As with many public services, delivery of education is increasingly shifting towards market solutions (Barzelay, 2001; Pollit and Bouckaert, 2004; Bach and Kessler, 2008). State management of education is, according to Peck and Tickell (2002:389), being 'rolled-back' and supply-side policies that enthusiastically encourage business activity in the educational arena 'rolled-out'.

Explained by neoliberalism, a phenomenon postulated as 'the dominant ideology shaping our world today' (Saad-Filho and Johnston, 2005:1), these new modes of ownership and governance rest on 'the belief that nation states ought to abstain from intervening in the economy, [leaving] as much as possible up to individuals participating in free and self-regulating markets' (Thorsen and Lie, 2007:2). Tracing its roots back to the classical liberalism advocated by Adam Smith (Clarke, 2005), in these terms neoliberalism is better understood as economic liberalism; that is, whereas *political* liberalism favours individual liberty, free trade and moderate political and social reform, *economic* liberalism focuses on a drive to ground public services 'in the economic rationality of markets' (Shamir, 2008:3). Thus, with reference to education, supporters of neoliberalism (evidenced in many Western government policy agendas) contend that creating a privat(ised) quasi-market in educational services will foster competition among providers, spur choice, encourage delivery at a lower cost than through traditional state-run schools and, above all, that marketisation improves quality. Whether these outcomes have been achieved is, according to Molnar and Garcia (2007) debatable; it is clear, however, after Ball (2012), that in many countries, governmental policy preferences have increasingly leant towards economic liberalisation and a 'businessing of education' (Black, 2005:2) that is opening up possibilities for strategic investment by for-profit firms.

That is not to say that governments are seeking to extract themselves from the responsibilities of education, rather that neoliberalism sees those responsibilities exercised through new modalities – a shift, Ball (2012) suggests, from *government* to *governance*. In this paradigm, Ball argues, the role of the state is to set the limits of markets ‘whilst at the same time creating the conditions within which the market can flourish and expand’ (*op. cit.*:17). It is through these shifts from state to private provision, shifts found across the globe, in which originates the space for international schools as a mode of educational delivery. For example:

- In 1992 Thailand deregulated its private schools market, permitting international schools to allow attendance of local nationals (Techavijit, 2007); and, in 2013, then Education Minister Phongthep Thepkanjana asserted that ‘the business sector step in and actively engage in the provision of educational services’ (Saengpassa, 2013).
- In 2012 the Malaysian government introduced regulatory changes giving a 100% tax incentive on capital expenditure for new international schools, or existing international schools that undertake expansion (ICEF, 2012; Ang and Kwok, 2012).
- Proposed legislation in India (in 2016 not yet passed), intended to expand foreign participation in India’s education system (Ang and Kwok, 2012).
- The South Korean government gave both Branksome Hall and North London Collegiate School significant investment to support their opening on the island of Jeju (*ibid*).

In sum, globalisation has created demand (and necessity) for international education and, in turn, neoliberal policy has created the regulatory framework (and the ideological acceptance) for that demand to be filled (at least in part) by international schools - ten years ago these schools numbered 2,584, today there are 8,209 (ISC Research, 2016). As this rapid growth shows, with ever more countries pursuing neoliberal policies, international schools continue to find new spaces in which regulatory frameworks permit (and may even encourage) their citizens to choose these schools as educational providers.

2.1 THE BUSINESS OF INTERNATIONAL SCHOOLING

How does this growth play out for school leaders? With the number of international schools rapidly increasing, to what extent are market forces encouraging, cajoling and demanding that international schools (and their leaders) manage (their schools and their selves) in ever more managerial ways?

This is an important line of enquiry. If the argument in relation to UK, US and Australian schools is that exposure to market forces disciplines school leaders into managerial form, then the extent to which those same forces apply to private, and predominantly for-profit international schools, is all the more significant. That is, finding strong market forces would offer a rationale for managerial and/or business-like identifications by technical necessity. In contrast, finding only weak market forces problematises the argument that international school leaders are disciplined managerially because market forces demand such.

2.1.1 How Competitive is International Schooling?

Written in 1979, Michael Porter's first *Harvard Business Review* paper, '*How Competitive Forces Shape Strategy*', offers a model for evaluating the influence of market forces¹⁵. Porter suggested that the competitiveness of an industry depends on five basic forces: the threat of new market entrants, the bargaining power of buyers, the bargaining power of suppliers, the threat of substitutes and the competitive rivalry among firms in the market (Porter, 1979:140). Each of those forces is now considered with regard to international schooling.

¹⁵ The works of Porter have been chosen because he is widely considered as one of the world's most influential thinkers on management and competitiveness (see *Harvard Business Review*, 2008; *The Economist*, 2011). Whilst many of Porter's theories have 'suffered ambivalence over the years in academic circles' (Hammonds, 2001: *no pagination*), largely because they were developed 'under economic conditions that have changed fundamentally since the time of their conception' (Recklies, 2001: *no pagination*), they have proven 'wildly compelling among business leaders' (*ibid.*) and remain, according to Mintzberg, Ahlstrand and Lampel (2008), the foundation of much strategic thought.

2.1.2 Threat of Entry

According to Porter, the threat of new entrants (in this case new schools) to a market is determined by the extent and type of *barriers to entry*. In simple terms, the easier it is to enter a market, the more new entrants there will be and the more competitive the market.

Porter lists a range of factors that determine threat of entry, the most significant of these being economies of scale - the financial benefits (cost savings) a firm gains as it grows in size (Arnold, 2013). Scale is important because the size of market incumbents acts as a deterrent to entry by forcing new firms to enter at scale (increasing the capital requirement) or by forcing new firms to accept a cost disadvantage and, therefore, limitations on price and profitability (Porter, 1980). In short, the greater the economies of scale enjoyed by incumbents, the lower the threat of entry.

At the time of writing 58% of international schools have rolls with fewer than 499 students (ISC Research, 2016). This prevalence suggests that the cost advantages of scale do not present a significant barrier to entry. Larger schools do enjoy some benefits of size – attracting, for example, better qualified staff, benefiting from a lower labour cost per unit and the ability to spread recruitment costs over a larger number of staff – but the extent to which scale can be exploited seems limited. Many schools are constrained from growing by physical space and the capacity restrictions of local transport links. As a result, in even the smallest cities there often remains geographic and strategic space for new schools to secure a segment of the market simply by virtue of location. In Singapore, for example, a country covering only 607sq kilometres (CIA World Fact Book, 2014), and enjoying excellent transport links (Marukatat, 2013), of 83 international schools only 18 educate more than 1,000 students whereas 43 schools educate fewer than 249 students (ISC Research, 2015) – in other words scale does not seem to present a barrier to entry.

In the same vein, the ability to raise sufficient capital for market entry also presents limited barriers to entry. Porter suggests that where 'industry returns are attractive...and [where] capital markets are efficient, investors will provide entrants with the funds they need' (Porter, 2008:27). That sentiment is echoed for international schools in the surfeit of local investors seeking international school partners (Sambidge, 2013) and, as noted above, in the financial support offered to international schools by many governments. Thus, whilst availability of capital is a consideration, it is not a substantive barrier to market entry; where necessary funding is readily available.

Such analysis suggests competitive markets. With economies of scale and access to capital providing limited barriers to entry, and as the growth in school numbers suggests, it appears relatively easy for new schools to set-up. In Porter's terms, the field should be highly competitive.

Countering this though are what Porter calls 'incumbency advantages independent of size' (Porter, 2008:27). In essence, these advantages are the industry norms that define minimum quality/service standards. Here, what deters entry is not *size* but the *approaches* of incumbents. As parents and students (customers) come to expect higher levels of service, defined, for example, in the effectiveness/quality of school systems, it becomes ever more expensive for new entrants to replicate the norms of the field; the cost of operational efficacy becomes a barrier to entry.

These incumbency advantages also extend to what Porter calls *switching costs* - 'costs that buyers face when they change suppliers' (Porter, 2008:27). For private schools these switching costs are exceptionally high. Private (and international) schooling is a market with strong irreversibilities, once it has been committed to it is hard to abandon part way through - few parents, or children, would wish a return to state education. Added to this are emotional

connections to a school, reputation effects and the substantial non-refundable application and registration fees charged by many international schools. As a result, education is a market with high emotional *and* financial switching costs; incumbents gain significant advantage from the irreversibility of buyers' decisions.

Scale and capital requirements seem then to present limited barriers to entry, in theory, increasing competitiveness. Nevertheless, the advantages of incumbency and high switching costs substantially mitigate these threats. As the extent of international school growth attests, in many markets, new entrants are able to find niches (locational or strategic) that protect them from incumbents, and in turn protect the incumbents from competitive threat. What emerges is a field where the number of firms may be growing, but only to the extent that new entrants can capture *new* market growth (i.e. the extent to which they can capture segments of middle class demand not currently being served by incumbents).

2.1.3 The Power of Suppliers

Porter defines the power of suppliers as the ability of those suppliers 'to squeeze profitability out of an industry that is unable to pass on cost increases in its own prices' (Porter, 1980:27). The greater the extent to which firms are faced with rising costs the harder they must fight to protect profitability and, therefore, the more competitive the market becomes.

In cost terms, the greatest threat to schools comes from teachers. With between two-thirds and three-quarters of school fees spent on staff salaries (The Economist, 2009) and with, as Mancuso, Roberts and White (2014) argue, teacher retention and salary packages closely linked, salary costs are a significant factor in the profitability of schools. Teachers could, in theory, demand increases to pay and conditions such that profitability was reduced, and the competitiveness of the industry increased. However, for the moment, supply of teachers outstrips demand (IPSEF,

2015). The power of teachers to demand terms is resultantly minimal. Whilst schools do compete for teachers, there are currently sufficient numbers to mitigate (though by no means remove) the impact of that competition.

Of the various suppliers of other educational services (caterers, book suppliers and the like) none, arguably, have sufficient monopoly to exert significant power on international schools. Even where a school has limited supplier options – school catering for example – the cost of those services is usually small (relative to other costs) and is often charged directly to students. Similarly, whilst there are curriculum and examination expenses, for the most part these costs are met by parents. In short, so long as any increased supplier costs can be passed onto parents (as they traditionally have been) profit margins will remain healthy.

As with threat of entry, this analysis suggests that competitive pressures as a result of market tightening are (currently) relatively weak. Suppliers are not squeezing out profitability (or making it difficult for schools to survive) and, in turn, the schools are not, at least not in Porter's terms, being driven by supplier power to turn to cost-cutting or marketing activities to maintain fiscal surplus.

2.1.4 The Power of Buyers

Buyers are considered powerful, and the industry more competitive, if they have sufficient leverage to force price reductions. As Porter states:

“Powerful customers – the flipside of powerful suppliers – can capture more value by forcing down prices, demanding better quality or more service (thereby driving up costs).” (Porter, 1980:24)

In part, the power of buyers is determined by the substitutability of the product/s offered by a firm; the availability of alternative products that serve similar consumer needs. The larger the number of substitutes (the more alternatives the consumer has available to them) the greater the power of buyers and the harder firms have to fight for those buyers.

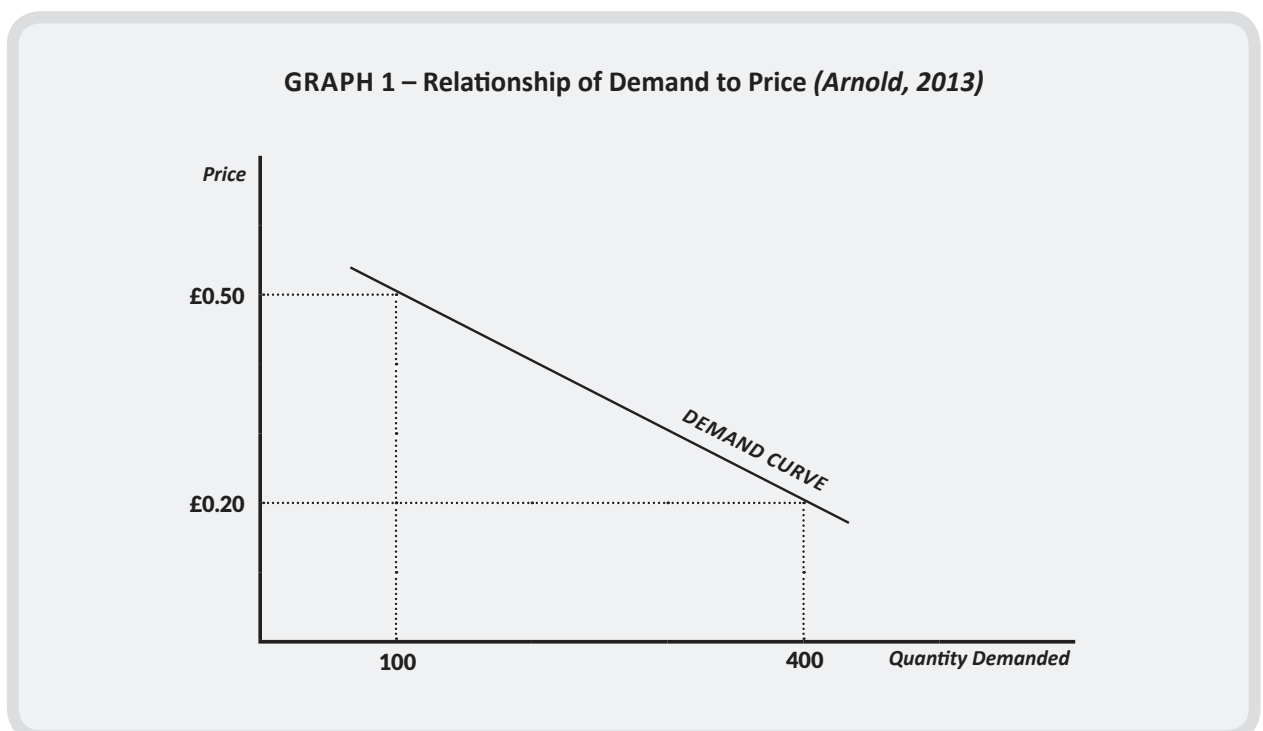
At first glance, it would seem that international schools are highly substitutable, the curricula of one school easily interchangeable with those of others. The reality is though that once a student commences study on a particular curriculum the ease with which one can be substituted for another is significantly reduced. Initial choice is key; every year that a student spends in one curricula system increases the difficulty of shifting to an alternate (though this eases slightly with post-16 choices). There are also considerations re the type, quality and increasingly the brand of school for a particular child or family's needs. Resultantly, as noted, private schooling has high emotional switching costs; buyers (parents) may appear to have options but their freedom to choose between these options is often limited.

The extent of this substitutability is also reduced by locational factors. Based on research which shows students usually travel less than forty minutes to attend school, Parthenon Education contend that 'K-12 education is a local catchment business' (2015:12). K-12 students will only travel limited distances to go to school, and younger students travel even shorter distances again. Whilst boarding schools do exist, they represent only a small proportion of the market¹⁶. Additionally, with local nationals accounting for up to 80% of international school populations (ISC Research, 2015) in essence only 20% of students are potentially geographically mobile (of which only a small proportion readily move between countries/schools¹⁷).

¹⁶ Exact figures on the number of international boarding schools are not currently recorded as far as can be ascertained.

¹⁷ The Parthenon Group's Education Division suggest that on an annual basis only 25% of the expat market in any given country is ever in churn, i.e. parents changing countries of work and thus schools. In essence then, if these

There is then the possibility of substitutability between different curricula; some parents may, regardless of locational factors, choose an international school based on its curriculum offering¹⁸. However, for the most part substitution is limited to specific (and relatively small) geographic regions and to specific stages in a student’s school career when transition between curriculums is least disruptive (the transition, for example, between Primary and Secondary school, or between Secondary and post-16 education). The consequence of this relative lack of substitutability can be observed in market prices (international school fees). In theoretical terms, where a lack of substitutability reduces buyer power, demand is less sensitive to price changes. Prices can rise without unduly affecting demand. The extent of this price sensitivity, and the extent to which price is a significant competitive pressure, can be calculated using price elasticity of demand (PED), a measure of how responsive demand for a good/service is to changes in its price (Arnold, 2013). Traditionally price and demand have an inverse relationship:



figures are correct, 85% of international school enrolment in any given country is local and/or long-term resident (Parthenon, 2015).

¹⁸ The Swiss *Institut Le Rosey* (colloquially known as the ‘School of Kings’), for example, has educated numerous kings, princes, princesses and the children of Elizabeth Taylor, John Lennon, Diana Ross and Winston Churchill. At the time of writing, as the most expensive private school in the world (Mount, 2015), the *Institut Le Rosey* offers a ‘product’ that is global in its appeal and exclusive in its nature – few parents can afford an *Institut Le Rosey* education, but for those who can, location is of little concern.

As the graph shows, under normal economic circumstances demand tends to increase as price falls (and, conversely, demand decreases as prices rise). The strength of the relationship between price and demand is represented in the gradient of the demand curve (above), the steeper the curve the greater the impact of price changes on demand.

This relationship can also be examined using the formula¹⁹:

$$PED = \frac{\% \Delta Q_d}{\% \Delta P}$$

Applying this formula to a variety of international school markets is revealing:

Table 1 – Price elasticity of demand for indicative international school markets

COUNTRY	YEARS	PERCENTAGE CHANGE IN SCHOOL FEES (PRICE)	PERCENTAGE CHANGE IN NUMBER OF CHILDREN IN INTERNATIONAL SCHOOLS (DEMAND)	PRICE ELASTICITY OF DEMAND
THAILAND	2006-2012	+36%	+49.5%	+1.4
MALAYSIA	2011-2015	+11	+39%	+3.7
DUBAI	2005-2011	+4.5%	+8%	+1.77
SAUDI ARABIA	2014-2015	+9%	+9%	+1
SINGAPORE	2010-2015	+6%	+186%	+31
BEIJING	2014-2015	+5	+23%	+4.6
SHANGHAI	2014-2015	+5.5	+22%	+4
HONG KONG	2015-2016	+6%	+8%	+1.33

NB – Varying date ranges were dependent on data availability (via ISC Research and Parthenon Education).

As stated, because under normal circumstances the demand curve is downward sloping, the numerator and denominator of the PED formula always have opposite signs; if one is positive, the other is negative (as, for example, price increases demand falls). Thus, when calculated, PED is always negative – except, it seems, in the case of international school education. For the

¹⁹ The more sensitive demand for a good is to price the larger the output of this formula. So, for example, where PED is very sensitive a price increase will lead to a proportionality larger fall in demand, the good/service is termed *price elastic* and will have a PED of greater than 1. Where the formula yields a result smaller than 1 demand for the good is considered to be not very sensitive to price (*price inelastic*). (McConnell, Brue and Flynn, 2012)

international school markets analysed above both variables are positive and therefore PED is also, unusually, positive. In essence, as the data shows, despite the laws of economics, as school fees have risen demand has also increased, and at a proportionality faster rate.

Explained by the concept of a Veblen good it seems that ‘conspicuous consumption’ (Leibenstein, 1950:183) and its close companion, ‘competitive consumption’ (Hirsch, 1997 in Lury, 2011:47), help clarify this economic anomaly. Under Veblenian conditions demand for a good increases as prices rise because of the status accrued through purchase; parents are willing to pay more (and more and more) because of the prestige attached to an international school education. Combined with the impact of rising incomes (see below), Veblen conditions put such a powerful upward pressure on demand that normal price dynamics are reversed. While parental resistance to fee rises may be vocal, such opposition is, the data suggests, relatively toothless. As *The Economist* notes, albeit in general reference to private education:

“As long as fees do not go up unbearably in any one year, parents, like frogs in slowly boiled water, stay rather than jump’ (The Economist, 2009: *no pagination*)”

With the weight of economic forces behind them, the market seems to be tolerating (indeed, seemingly ignoring) substantial annual price rises. It is reasonable to ask for how long this might continue? How hot does the water need to get before the frogs do start jumping?

A partial answer to this question is provided through consideration of parental income. As Clark (2014) notes, the outsized growth in fee income is suggestive of a market where ability (and willingness) to pay is rising rapidly. Indeed, according to Clark, international school enrolment is

dominated by the richest 5% of non-English speaking local families; in the United Arab Emirates top schools charge in excess of US\$25,000 a year, while the most expensive schools in China reach \$40,000 annually, equivalent to tuition fees at Western universities. Yet, despite such fees, the evidence shows that demand for international school places is healthier than ever (ISC Research, 2016). The price of an international school education may be rising but so too is the wealth and number of those who value this form of education for their children.

Barring major economic catastrophe then, if incomes continue to rise, international schools should continue to enjoy a privileged existence. Few other markets can claim the type of benign competitive conditions that see prices rise and rise without buyers exiting the market in significant numbers.

2.1.5 The Threat of Substitutes

For Porter a substitute 'performs the same or a similar function as an industry's product by a different means' (Porter, 1980:31). Put simply, the more attractive the performance of substitutes, the greater the competitive demands. Here those alternative means can be considered as education offered by the state or by non-international private schools.

As noted above, set against a neoliberal ideology which encourages and supports international schooling, there is strong evidence that state education is not considered, even by the states themselves, as a viable substitute for an international school education. Given the level of demand for international school places, the same can also be said to be true of parents; in many markets international schools (currently) offer a form of education often largely unavailable by other means. Longer term, however, local private schools, and even local state schools, may start to offer viable competition and could capture market share previously destined for international schools. Indeed, market trends show that these schools, necessitated by the demands of

globalisation, are increasingly offering international curriculum streams and are beginning to employ larger numbers of Western (or, at the very least, native English speaking) teachers (ISC Research, 2015). At the moment, these schools cater largely to parents for whom an international education is out of financial reach. Over time though it is conceivable that some of these schools will broaden their product offerings and improve their quality, thus competing more directly with international schools – an intriguing possibility.

The other substitution danger, one already experienced by the most expensive international schools (ISC Research, 2015), is that once fees reach a level commensurate with that charged in the UK or US, many parents may choose to send their children overseas. Whilst international schools may currently enjoy Veblen conditions, schools seeking to exploit those conditions would be well advised to exercise caution before increasing fees too much.

For now though, research shows that many international schools currently turnover less than 10% of their student roll annually (Grattan Institute, 2013)²⁰. Set against compound growth in student numbers of 300% (since 2000) and average annual growth of 10% plus, substitution may be a concern but, in aggregate, international schools seem able to replace any losses. The low quality of substitutes, the high financial and emotional switching costs, and the large numbers of buyers entering the markets mitigates the threat of substitution.

2.1.6 Intensity of Rivalry

According to Porter, the intensity of rivalry within an industry depends on the nature and extent of competition between firms; the greater the market limitations on profit the more intense the competition (Porter, 1980). In addressing this rivalry, in his paper *'The International School*

²⁰ Churn rates were also a topic of the face-to-face interviews with Heads; each reported churn rates of less than 10%.

Industry' (2006), MacDonald examines whether the structural conditions of monopoly, oligopoly, monopolistic competition or perfect competition might best describe the nature of competition between international schools. While acknowledging the variability of structural conditions across different markets, he offers though only an overview of how each structure might apply to international schools, stopping short of concluding which model/s might describe a given location. His observations are, however, a useful starting point.

MacDonald rightly dismisses perfect competition²¹ as a hypothetical construction 'not describing international school markets very well' (*op cit*:205) and correctly identifies the existence of monopolies as present in some international school markets:

“In some cities, it is not uncommon to find only one supplier of international education with no direct competition. In this case, the school could be called a monopoly”. (*op cit*:204)

MacDonald's treatment of oligopoly and, in particular, of monopolistic competition are, however, somewhat less revealing. He acknowledges, albeit obliquely, the possibility that some international school markets may be oligopolistic (where a few schools dominate) but the implications of that suggestion are not explored in any detail. Similarly, the notion of monopolistic competition is, I contend, too readily dismissed.

²¹ Perfect competition is a theoretical market situation where there are many sellers, each selling homogenous products with buyers enjoying perfect knowledge and no switching costs. This creates, in theory, extremely competitive market conditions. In reality no market operates under perfectly competitive conditions (products are rarely homogenous, buyer knowledge is rarely perfect and there are usually switching costs associated with changing suppliers).

Monopolistic competition, first advanced by Edward Chamberlin in his paper '*Theory of Monopolistic Competition*' (1933; in Bellante, 2004) and by the British economist Joan Robinson in her text '*Economics of Imperfect Competition*' (1933 in Bellante, 2004), describes a market structure in which there are many competitors, each with a slightly different product offering. Under these conditions, there are many buyers (in the case of schools, parents) and many sellers (the schools themselves) but through product differentiation, or geographical location, each firm offers, to some extent at least, a 'unique' product and thus exercises a greater degree of control over prices than is common in more competitive markets.

As a result of this market power, in the short-run firms in monopolistically competitive markets enjoy supernormal profits²² - a school in a prestigious city centre location will, for example, be able to charge premium fees. Over the long-run, these supernormal profits attract new market entrants and profits fall back to normal levels (Arnold, 2013). This situation seems to fit both academically and empirically with the nature of international school growth. The reason for current growth is the attraction of supernormal profits. Over time, however, new entrants will force profits to return to normal levels and market conditions will tighten. Thus, whilst MacDonald seems to shy away from suggesting that international school markets can be monopolistically competitive the view is taken here that many are, in fact, just that.

In order to test this hypothesis it is possible to calculate a market concentration ratio - a measure of the proportion of total output in an industry produced by the largest firms (Arnold, 2013). The most commonly used concentration ratio is a four-firm calculation: total sales of the largest four firms divided by total industry sales. Substituting sales for student numbers, the formula, with C_4

²² Where *normal profit* is defined as the minimum reward that is just sufficient to keep the entrepreneur supplying their enterprise, *supernormal profit* is where a firm makes more than normal profit. *Normal profit* offers a reward above the level of opportunity cost, that is, just better than the next best alternative; *supernormal profits* are earned when total revenue is greater than the total costs, including the opportunity cost of normal profit (Arnold, 2013).

signifying the concentration ratio, S_1 through S_4 student roll for the four largest schools, and S_R total student numbers across the market, is as follows (Baye, 2013:233):

Four-Firm Concentration Ratio Formula and Explanation

$$C_4 = \frac{S_1 + S_2 + S_3 + S_4}{S_r} \times 100$$

Applied, for example, to Thailand, as of September 2015, this equates to a concentration ratio of 17% (i.e. 17% of the market is dominated by the four largest schools)²³. Perfect competition equates to an outcome of 0% and 100% a monopoly. Anything between 1% and 50% represents monopolistic competition, with oligopoly at 50% and over (Arnold, 2013). With a ratio of 17% Thailand is monopolistically competitive. Similar monopolistically competitive market structures can be found, particularly within Asia, across the many international school markets that have witnessed rapid growth in recent years:

Table 2 - Exemplars of Four-Firm Concentration Ratio for key international school markets

COUNTRY	CITY	FOUR FIRM CONCENTRATION RATIO	
			PERFECT COMPETITION (0%)
UAE	Dubai	4%	MONOPOLISTICALLY COMPETITIVE
China	Shanghai	9%	
China	Beijing	10%	
UAE	Abu Dhabi	10%	
Hong Kong	-	11%	
Pakistan	Karachi	12%	
Thailand	Bangkok	17%	
Japan	Tokyo	18%	
Vietnam	Hoh Chi Minh City	19%	
Singapore	-	21%	
India	Mumbai	22%	
Malaysia	Kuala Lumpur	25%	
Germany	Berlin	50%	

²³ The calculation is based on the rolls of the four largest schools in Bangkok at the time of writing: 2,246; 1,896; 1,604; 1575 (ISC Research, 2015). A full set of figures used for calculation can be found in the appendices (with school names anonymised for confidentiality).

On the one hand then, the monopolistically competitive nature of many international school markets serves to reduce rivalry. Indeed, many international schools do not actually see each other as competitors. It is common, for example, for Heads to meet with each other regularly to discuss, within limits, educational and business concerns, and for schools to even share aggregate salary scales (EARCOS, 2013). The atmosphere is, on the surface at least, one of collaboration *not* competition.

On the other hand, international schools may appear to enjoy monopolistically competitive markets positions but that does not mean that they are not competing in other non-economic ways. Examine many international school conference agendas and it is clear that school managers are increasingly required to 'decide what attributes make the school more attractive...[and] what differentiates the school...within the marketplace' (Murgatroyd and Morgan, 1994:39). Independent of economically-derived competition there exists a positional logic between private schools (Marginson, 1997). This positionality, created by systems that reify comparison with other schools, is used to gain competitive advantage. Schools may not need these bragging rights in economic terms, but they claim them and loudly proclaim them regardless. Schools do this in many ways. Some merely publicise their superiority over other schools by highlighting academic results, others through reference to sporting success, drama productions, charity work or additional curricular and extra-curricular opportunities available at such schools. Alternatively, as Marginson also notes, schools are increasingly making reference to the competitive advantage that their students will gain over others in terms of their future prospects for jobs, income, social standing and prestige.

Significantly, this positionality does play out economically, even if not immediately. A school that regularly loses a significant proportion of its students, even if they are replaced, cannot thrive educationally. If successful students leave to finish their education at a more prestigious school,

then it is that new school which ultimately benefits from the groundwork, often the hardest work, when those students graduate with high grades. Whereas net income may be unaffected if students are replaced (as demand figures suggest occurs), in time, the original school would have been able to charge higher fees if it retained those students and reaped the marketing benefits of its successful graduates. Empirically, this is the reality for many second-tier international schools. In contrast, a school that can retain students, can begin to compete with those in the highest tier, and command the fees of the highest achieving schools.

To conclude, in Porter's terms, fuelled by the growing ability and willingness of parents to pay for an international education, international schools operate from an advantaged position. As their number increases, international schools may be under pressure to differentiate themselves (they need to secure their market positions), but protected by geographically defined monopolistically competitive market forces, as the continual rise in school numbers shows, they are yet to feel the ravages of intensive economic rivalry. For the moment, the weight of market forces are behind international schools, urging them on, encouraging them to open new campuses and new branches. Driven by globalisation and neoliberalism, international schools are riding on the crest of a middle-class wave. The days of supernormal profits may be waning but, for the moment, few international schools have to fight for their survival – what they (and their leaders) are fighting for is prestige.

2.2 SUMMARY

International schooling has been brought to life by globalisation and by the global sweep of neoliberalism. However, as suggested by the analysis above, the international schools themselves are (and always have been) private entities, largely free from government influence. They are also heavily localised, serving a geographically narrow, privileged and wealthy clientele.

Many enjoy economically benign (monopolistically competitive) markets. Thus, as the chapter argues, the extent to which corporatisation and marketisation are the primary forces driving *economic need for/influence over Heads' identifications* is contestable.

Proposed then is that the disciplinary influences to which international school Heads are subject do not result *only* from the exposure of schools to economic realities (marketisation); international school leaders are certainly not immune from those forces, but they are also not (newly, solely or aggressively) beholden to them. Argued is that it is not enough to assume that international school leaders are affected by business because their schools are businesses. This is not to say that competition is not a factor in international school dynamics; the monopolistically competitive nature of many markets may limit the impact of economic forces, but international schools clearly feel the need to actively promote their distinctiveness beyond any need to fill capacity or to hit profit targets. Rather, it is to argue that in the (current) gold rush climate of international schooling, it is not solely the market which bites, it is (and perhaps more so) managerialism which has the greater influence on Heads' identity work.

With economic influence bracketed out of (though not entirely removed from) the analysis, what Heads experience subjectification through, this chapter establishes, is less about the practical demands of business and more about the managerial tendency to actively create competitive environments, especially where a competitive imperative is not a natural consequence of market forces (Ball, 2003b; 2015). Thus, from a position where evolutions in professionalism (and the inculcations of managerialism particularly) are not appropriately conceived as a direct and functional consequence of the business environment, it is suggested that Heads' attachments to professionalism, in both educational and managerial form, and to the institutional work and identity work done by individuals as they perform as professionals, are more revealing lines of analysis.

CHAPTER 3: LITERATURE REVIEW

As Chapter 1 argued, the governing influences of managerialism on international school Heads cannot be attributed to changes in ownership form (to technical/legal corporatisation); international schools, for the most part, have always been private entities. Nor, as Chapter 2 established, can managerialism be solely ascribed to economic realities (marketisation), these forces being longstanding features of the field found to have relatively weak influence.

These findings justify, therefore, the bracketing out regulatory and economic influence and further highlight examination of identity work as an important, and in the context of international schools, as yet under researched field of study. This chapter picks up and deepens that theme.

The literatures selected for review have been chosen for their ability to open up perspectives on how identity is affected by attachments to professionalism and to the discourses of managerialism. On this basis, and with few studies dealing specifically with international schools, the review does not restrict itself to literature solely focussed on educational management. Works dealing with the influences of managerialism on UK educationalists, Ball's (2006) distinction between professional and market values for example, provide a useful starting point. However, by design and by necessity, these are supported by works dealing with other theoretical domains (most obviously theories of identity) and other empirical contexts (most notably health care, from where hybridity has proved a recent addition to the analysis of changing to the professions). The critical extension of these literatures to the international school context is argued to be valid and appropriate because the interest of this study is in unpacking the disciplinary work done by and done to Heads not by policy but through *discourse* – this theoretical and epistemological position arguably 'traveling' across contexts.

From that position, this chapter examines the ways in which the different discourses circulating Headship seem to affect, fit with and/or fuel Heads' identities as educational professionals and as managers. What it suggests is that, played out through the institution of Headship via the politics of professionalism and at an individual level via the politics of identity, the concept of hybridity might be a useful means of addressing these dualities. Theories of hybridity have not (yet) been introduced into educational research, or in work to understand international schooling specifically, but they have been explored across other contexts where changing practices have prompted a recent academic focus on *hybridity* - professionals within an area of expertise who develop relational capability (occupational and ontological) across multiple discursive positions (Noordegraaf, 2007; 2011; Waring and Currie, 2009; O'Reilly and Reed, 2011; McGivern *et al.*, 2015). This review considers those early uses of the idea of hybridity and asks whether and where there might be space for further theoretical contribution.

The chapter proceeds in three parts. Addressed first is managerialism, consideration being given to what managerialism is, its antecedents, processes and outcomes. Secondly, attention is drawn to identity, identity work and to the formation of the professional subject through discourse. The chapter concludes with an examination of hybridity as one form of response to the dynamics of plural institutional environments – an investigation of (self and field-wide constitutive) choices whereby the subject can exercise some degree of agency about the type of professional they wish to be (and be seen as).

3.1 CONTEXTUAL ANTECEDENTS: EDUCATION AND MANAGERIALISM

Having briefly defined managerialism in Chapter 1, here a more detailed analysis is undertaken; the history of managerialism is charted, its implications for the processes of professionalism are considered; and its potential consequences for the identity work of international school Heads are suggested.

3.1.1 From Management to Managerialism

To the casual observer the task of management is often either blindingly obvious (the colloquial “let me tell you what management should do”) or a complete mystery (“I don’t know what management are doing”). According to Grey, the most common definition of management is simply:

“Getting things done through other people” (Grey, 2013:58)

So idiomatic is this definition that it is usually quoted without citation and as common sense understanding. The definition does little though to reveal what management actually *is* and what managers actually *do*. Perhaps, however, it is not the definition that matters but its taken-for-granted nature. It is assumed that management is the natural order of things. This was not always the case.

Management and managers exist as a consequence of increasing organisation of work processes in the early 20th century. In these early days (and perhaps even arguably through to today) the role of management was, as Grey (*op. cit.*) reports, distrusted, resented and resisted. Sabotage, absenteeism and high labour turnover were common. The acceptance of management, and its legitimacy, came about as factories responded to the mass-production demands of World War I and to increasing consumerism thereafter; managers were necessary to organise (and control)

the growing and increasingly complex apparatus of production. Workers may have resented being *managed* but the requirement for *management* became an accepted discourse.

At its most basic, management is associated with functional²⁴ and utilitarian conceptions of efficiency, order, output and compliance. These conceptions, Drucker (1973) suggests, found traction in the Scientific/Taylorist²⁵ approaches of early management thinking and, subsequently, in the Human Relations movement that took root in the 1920s and 1930s under the guidance of Elton Mayo. Forward to today and a cursory glance at any edition of Harvard Business Review or a reading of the popularist (and positivist) management texts of the type found in airports - 'From Good to Great' (Collins, 2001), 'The Business of Belief' (Asacker, 2013), 'The One Thing' (Keller and Papasan, 2013) – reveals a view of management where managerial action is linked instrumentally to organisational performance. For these authors, held within the profession of management are the secrets of organisational and individual success – or so they would have us believe.

It is within the seductive promises of these texts (and in the Business School ethos that they represent) that is found a privileging of the belief that:

- “Managers are skilled experts who have the right to act as agents for owners and shareholders.
- Managerial work is characterised by rationality and neutrality.

²⁴ With its origins in the works of Emile Durkheim, Functionalism emphasises consensus and order, focusing on social stability and shared public values. Functionalism sees society as a system, a set of interconnected parts that together form a whole. For functionalists change in one part of society leads, inexorably, to change in another (Anderson and Brown, 2010) – action is instrumentally linked to outcome.

²⁵ Taylorism opts for channeling agency and delimiting its boundaries through overt, direct control and scientific measurement of task. It is unobtrusive, with a top-down orientation that sees power concentrated in the hands of policy-makers and organisational leaders. It operates through detailed specification of who is to do what, and exactly how, to achieve specified outcomes (Lystbæk, 2012).

- Efficiency should be pursued by minimising costs and maximising profit and productivity.
- Managers have the right to make decisions and give instructions to employees without seeking consent.
- Managers act in line with the common good and are the instruments and administrators of capitalism.
- Analytical and scientific management techniques should be used to resolve problems and increase efficiency.” (Cunliffe, 2009:19)

As a tool of the Anglo-American tradition of capitalism (Cassell and Lee, 2011), at the extreme these beliefs take on the guise of a ‘civic religion’ (Parker, 2009:2). So pervasive are these beliefs, Parker (2004) argues, that even for cynics the answer to organisational problems is often seen as better management and not as something else altogether. Organisations that run without management, co-operatives are seen as outliers, exceptions that prove the rule. Even Barristers’ chambers, as an exemplar of a professional grouping, utilise the services of a Barrister’s Clerk (a manager) to hold the nebulous organisation together.

That is, belief in management has become privileged via the discourse of *managerialism* – a belief whereby, as Jackson and Carter (2007) suggest, management is eulogised as beneficial for all; society and organisation, employer and employee alike. Managerialism:

“...combines management knowledge and ideology to establish itself systematically in organisations and society ... justif[ing] the application of managerial techniques to all areas of society on the grounds of superior ideology, expert training, and the

exclusive possession of managerial knowledge necessary to efficiently run corporations and societies” (Klikauer, 2013:2)

Beyond any functional need, the power of managerialism as a system of belief is that it encourages – or, as Foucault (1988) would argue, it governs - people to commit to (to internalise) its precepts willingly, for the good of organisations and for the good of individuals themselves. Explaining *managerialism* in educational terms, Hoyle and Wallace describe it as ‘management to excess’:

“Effective leadership and management ‘take the strain’ by creating structures and processes which allow teachers to engage as fully as possible in their key task. Managerialism, on the other hand, is leadership and management to excess. It transcends the support role of leadership and, in its extreme manifestation, becomes an end in itself” (Hoyle and Wallace, 2005:68)

To summarise, whereas the genesis of management is in the need for technical efficiency (a role, admittedly, still required today), managerialism is about justifying, validating and extending management power. Managerialism is a framework of thinking that privileges management as a legitimate ‘bulwark of civilization’ (Grey, 2013:53) and grants it a position of status that gives managers ‘the right to hire, fire, give orders, control and evaluate the performance of others in the interest of efficiency, productivity, profit or providing a service for the common good’ (Cunliffe, 2009:17).

3.1.2 Managerialism: The Panacea it Promises?

So pervasive is the contemporary belief in management, and the appeals of its power, that 'managerialism and managerial thinking have come to colonise every eventuality of human life' (Klikauer 2013:59). Its ideologies teaching us to willingly accept that 'resistance is futile' (*op cit.*:73). However, despite its seductions and promises, managerialism is subject to significant critique. Managerialism, for Klikauer (*op. cit.*), is akin to George Orwell's *Big Brother*, a panoptical all-seeing force operating as a technology of dominance and control. Other writers, Locke and Spender (2011) for example, though less sensationalist in their arguments, express similar concerns. Locke and Spender argue that managerialism fetishises monitoring and measurement, in the process unbalancing lives and societies and causing a leeching out of ethics, of commitment, of vocation, and of moral and political responsibility to society.

These concerns are not new. Throughout the history of management studies, and especially in the second part of the 20th century, numerous thinkers have criticised the dominant view of management. Even projects by those of a more positivist bias – Carlson's (1951) study of Swedish executives, Stewart's (1967) study of UK managers, and Mintzberg's (1973) study of American CEOs – have contradicted the rationalistic view of management. In each of these studies, it is suggested that managerial work is subject to uncertainty, and that management activities are fragmented and involve making choices within constraints and conflicting values. Writers of a more academic persuasion critique the heralded prescriptive and predictive nature of managerial work and its associated models and matrices in favour of complexity, fluidity, contradiction and fragmentation (Whitehead and Moodely, 1999). Consequently, the longstanding view of Critical Management Studies (CMS), informed by sociology, linguistics and philosophy, and by writers such as Clegg and Dunkerley (1976) and Foucault (1977, 1979), is self-consciously opposed to a positivist interpretation of management actions.

For writers, who adopt this critical stance (Alvesson, Knights, Willmott, Jackson and Carter, amongst others), management becomes the result of an interplay between dominant and subordinate discourses. These theorists aim to uncover the societal structures, ideologies and power relations (in other words, the discourses) that constitute and shape organisations and workplace relations (Alvesson and Deetz, 2000). In these terms there is no objectively real functional order able to be manipulated to managerial ends, organisation is discursively constructed – and as a result is fluid, unfixed and subject to contestation. What individuals are subjected to is not innate, fixed and functionalist management but attempts by individuals (both managers and non-managers) to assert their own subjectivity over others. Organisation (and with it management) is, therefore, derived through relationships of power (Foucault, 1977; 1979). As opposed to having sovereign form, organisations bind around each individual's desire for the power that is gained from identifying with the organisation and with hierarchical positions (especially that of manager).

Organisation from this perspective is an interactive social process in which actors create 'socially constructed artefacts' (Letiche, 2007:188) based around each individual's desire for coherence and for the shared benefits of belonging. Different individual readings of organisation may be entirely contradictory, and none privileged. A shift, for instance, to greater centralisation, envisioned by management as a means of instrumental organisational improvement, will be rationalised through a multitude of individual subjectivities and will always mean different things to different people, and never (or rarely) what was intended. Taken as such, as Clegg (2010) argues, institutional order is always fragile, negotiated and open to disruption by people who either do not know or willingly do not adhere to the rules.

On balance then, while there is profusion of literature claiming that organisations are, and purport to be, purposeful, positivist and rational, for proponents of CMS, managerialism is not the unproblematic civic religion its advocates would have it to be. For these theorists, in opposition, managerialism is an attempt to bring under control the inherently dissident nature of organisation. CMS prefers to see positivist management theory not as a panacea but as a form of domination; as a particular view and historical context that legitimises management, beyond any technical need. That management, after more than 100 years of management study, still needs improving, points, for these authors, to the very fallacy of the positivist ideology. From a CMS perspective, with organisations bound up in multiple, fluid and contingent individual interpretations, management and managers cannot offer the panacea they claim, and never will. In this regard, in its attempts to simplify the complex, ideological, political and social process of organising to a set of supposedly rational principles, roles and techniques, managerialism is not only positivist but also thoroughly reductionist.

3.1.3 Managerialism in Education: Practices

In Western contexts the transference of managerialism into public services is a well-documented phenomenon (see: Hood, 1991; Reed and Anthony, 1992; Pollitt, 1993; Clarke and Newman, 1994, 1997; Ball, 2003a, 2003b, 2012, 2015). As a mode of thinking, managerialism stresses not only the difference/s better management *could* make to public services but, more importantly, the difference/s it is believed managers *should* make to the quality and efficiency of those services – an emphasis on the (normative) power of management and managers to affect change.

In literature focused on the influence of managerialism on education (importantly for this study, literature largely focused on state educational provision) the outcomes of managerial influence are reported as, at the macro level, the Programme for International Student Assessment (PISA)

league tables, school inspection regimes and a proliferation of comparison websites, mechanisms and benchmarks (Ball, 2015). Also cited are credentialism (Hoyle and Wallace, 2005) and an enthusiasm for the measurement of consumer value, usually through pupil testing (Weinberger, 2007). In turn, at the micro-level, these discursive orientations take shape in management *practice* through: fixed-term contracts, performance measurement, performance related pay, benchmarking, client satisfaction surveys, Key Performance Indicators (KPIs), contractualism, client satisfaction and increasing accountability to performance metrics (Hood, 1991; Gewirtz *et al.*, 1995). There even exist texts which apply, and purport to make useful, business thinking for school leaders; Grey and Streshly's (2008) use of Collin's (2001) 'Good to Great' and his metaphor of 'getting the right people on the bus' being a notable example²⁶.

Encouraged by managerialism, these literatures see education as becoming something that can be precisely measured (Weinberger, 2007). Performance tables, the inspection system, performance management, examination and assessment arrangements all contribute to the accountability requirements of teachers and Head teachers (Hoyle and Wallace, 2005). Embedded in the ubiquitous development of data management systems, themselves underscored by testing, ever more complex managerial systems require teachers' performance to be measured and regularly appraised by senior leaders. According to Stevenson and Wood (2014), management checking of *student* work to monitor *teacher* performance, often conducted with no notice and sometimes without teacher knowledge, is increasingly commonplace. Moreover, performance is increasingly being linked to pay (Carter *et al.*, 2010). In the UK at least, automatic pay progression based on length of service is being removed, thereby ensuring that all pay progression is performance-related (STrB, 2012).

²⁶ Jim Collins 2001 text *Good to Great* is widely considered to be a 'classic' business text, sitting alongside – both in terms of its plaudits and critics – works such as Peters and Waterman's 1982 *In Search of Excellence* (Bryant, 2009). *Good to Great* is not though an educational text, nor even an education management text. It is entirely focussed on the corporate world; a fact which makes its application to educational contexts all the more revealing.

Further exemplifiers include the dismantling of collective bargaining systems, with management likely to take advantage of newly won discretion to introduce greater employment flexibility (Schulten, Brandt and Hermann, 2008), tiered employment systems that remunerate staff on a differential contractual basis and more individualised forms of pay determination (Bach and Bordogna, 2011). Tony Bush's argument that effective *management* plays a crucial role in successful schools (Bush, 2011) has been subverted into a 'technology of statistics' (Hunter, 1996:154). The result is new visibilities and a proliferation of spaces where professionals must re-invent 'themselves as units of resource whose performance and productivity must constantly be audited so that it can be enhanced' (Shore and Wright, 1999:559; in Ball, 2012b:18). Through managerialism school leaders are ever more 'governed by numbers' (Ozga and Grek, 2008:1) and teachers' 'days are numbered – literally – and ever more closely' (Ball, 2012b:18).

What this subversion evidences is the close counterpart of managerialism, performativity:

“... a technology, a culture and a mode of regulation that employs judgements, comparisons and displays as means of incentive, control, attrition and change based on rewards and sanctions (both material and symbolic). The performances (of individual subjects or organisations) serve as measures of productivity or output, or displays of 'quality', or 'moments' of promotion or inspection. As such they stand for, encapsulate or represent the worth, quality or value of an individual or organisation within a field of judgement.” (Ball, 2003a:216)

Here Ball can be seen to be taking Lyotard's view of performativity²⁷ as related to input-output, the relationship of *performance* to *production* (Lyotard, 1979). For Lyotard, the modernist privileging of knowledge for knowledge sake has been replaced by the logic of performativity. Truth is no longer the primary goal, it is performance that matters most – the best possible return on any given input. Performativity demands a focus on skills considered indispensable if the wider social system is to perform efficiently; privileged are skills that contribute to a country's participation in the markets of world competition. In education, subjects that explore the human condition, Drama for example, risk abandonment in favour of those that produce more tangible and measurable results, Mathematics for instance. In response, this dynamic shifts power to the measurable; Mathematics departments are front of stage, Drama departments are left in the wings.

Ball may be reporting these effects in relation to state education systems, but these kinds of measurement, regulation and control have potentially similar outcomes for international schools and, most pertinently, for their Heads. Ball's various works (and, as noted above, the work of other academics also dealing with state contexts) are introduced here because they provide a powerful and coherent conceptualisation of professional practice and its relationships with identity – Ball's (2015) paper '*Subjectivity as a site of struggle: refusing neoliberalism*' being a case in point.

Indeed, supporting this line of argument, a further review of literature highlights the effects of managerialism (and performativity) on educational professionals. Ball even goes so far as to adopt Lyotard's reference to the 'terrors of performativity' as the title of his 2003a paper, arguing

²⁷ While, as Mundy (2012) offers, not mutually exclusive of use of the term by Lyotard, an alternative conception of performativity is that of language philosopher John Austin. This view relates to the constitutive effects of language (its ability to describe *and* create), a view discussed in Section 3.2.3.

that managerialism is not only re-shaping teachers' experiences of work, but also what it means to be a teacher. It is through managerialism that commentators observe educators regarding themselves as 'de-skilled' (Braverman, 1998), 'de-professionalised' (Day, 2002a:109) and 'distrusted' (Ecclestone, 2002:100). Expressions of 'vulnerability' (Day and Qing, 2009:16), 'uncertainty' (Ball, 2003a:145), 'stress' (Travers and Cooper, 1996:57), 'exhaustion' (Troman and Woods, 2001:20) and 'fear, anguish, anger, despair, depression, humiliation ... and grief' (Carlyle and Woods, 2002:xiv) are common. Indeed, evidence suggests that the implications of managerialism are so severe that many teachers have left the profession in order to 'save themselves' (see: Travers and Cooper, 1996; Carlyle and Woods, 2002:x; Ball, 2003a:16). For writers building on these critiques, it is argued that teachers are not seen as highly educated professionals but rather, with strong echoes of Taylorism, as 'human widgets' (Hargreaves and Fullan, 2012:2) that can be redistributed, replaced or removed with ease.

3.1.4 Managerialism: The Middle Ground

As outlined, from some perspectives managerialism presents a largely functional view of management – an essentially neutral privileging of management and managers as the mechanism for facilitating 'optimum use of resources, decision-making and the rational division of labour, without which the organisation could not discharge its function' (Jackson and Carter, 2007:46). Seen this way, the purpose of management is to shape structure towards organisational ends 'in such a way that individuals will be interchangeable and the organisation thus free of dependence on personal qualities' (Barnard, 1938; in Selznick, 1948:25). In these terms, normative, positivist management texts, such as those noted above, are regarded as the crystal balls through which managers seek enlightenment; and management as a panacea whereby the models and matrixes of business theory promise employee action instrumentally and predictably linked to optimum organisational performance.

From other perspectives managerialism has been criticised for its failure to fully capture the lived experience of organisational reality. For critics, managerialism is not neutral, its meanings not shared, nor its outcomes universal or necessarily efficient. Managerialism is suggestive of relationships of power and of attempts by managers to capture that power, to assert their authority and, ultimately, to affirm their own (vulnerable) subjectivities amidst fluid and contingent organisational dynamics.

Found between these two positions is a middle ground. As Locke and Spender's (2011) analysis of managerialism highlights, the self-conception(s) by managers that they are an elite caste, a division of society privileged through rank, status and wealth, is important. Unlike traditional conceptions of caste, the status of management (for many managers - though by no means all) is *achieved* rather than *ascribed*. To be a manager is to have attained success (and, as a result, validity and power). While the individual manager may feel vulnerable and exposed, managerialism, as antidote, casts them as essential to the common good, as protector, sorter, saviour and hero. These identifications carry significant meaning; they affirm the individual as in control and in charge, of their own self and other selves. With management positions hard won and often (though admittedly not always) well-rewarded, managerialism holds seductive appeal.

Conceived as such, explanation is offered for the appeal of managerialism beyond any functional need. For managers it promises status, security and, faced with ever-shifting organisational dynamics, it promises order and definable purpose. For school leaders these promises may be particularly appealing. Unlike those in business, educational leaders, Baldrige (1971) suggests, do not enjoy a high degree of goal specificity and work in ambiguous 'loosely-coupled' (Weick, 1976:1), contested and changing contexts characterised by problematic purpose – a sentiment to which many international school Heads would no doubt attest. With, as Lortie (1969) and Bush (2011) point out, bureaucratic/rationalist management models tending to grossly oversimplify

the nature of the reality with which school leaders deal, managerialism offers a seductive 'answer' to the problems of school management. From a CMS stance the 'truth' of these answers may be contestable, and the sense of control managerialism gives may be illusive, but that makes it no less real and no less empowering for the individual school leader.

Management itself may not be a profession, at least not in the traditional sense enjoyed by doctors, solicitors and the like, but through managerialism it has become a privileged and elite undertaking. Managers, by definition, are in control. Managers are given status and their authority (at least from a functional perspective) is deferred to. Given such weighty possibilities it is no wonder that managers and management enjoy such a privileged position in society and little surprise that individuals are attracted to the promises of managerial success. Managers may themselves be subject to *managerial* judgement and comparison (they too are audited, controlled and subordinated, perhaps even more so than staff), but they also derive benefit from *being* a manager. Managerialism gives power even as it subjects the individual to power.

3.1.5 How to Identify Managerialism in Education

To address how these power affects manifest, and to examine relations of power between different discourses (specifically educational and managerial) it is necessary to distinguish management from managerialism and from the reported adoption of business-like practices (Black, 2005). That is, it is not enough to simply suggest that all forms of management represent managerialism and, likewise, that all forms of managerialism²⁸ are business-like. Indeed,

²⁸ Offering an alternative view, O'Reilly and Reed define managerial leadership as 'leaderism' (2010:960), a hybrid state between professionalism and managerialism, suggesting professionals may be more willing to take on hybrid roles when framed as *leadership*. In contrast, here it is argued that leaderism is merely further evidence of managerialism being discursively (re)aligned in a form more likely to find its way 'inside' the subject. Future research may usefully articulate further differences between these two 'isms, however, absent of such research (and unable to include it within the confines of this research project), here leaderism is considered to be broadly indistinguishable from managerialism.

management has always have been a part of an educational administrator's role - Heads have always needed to plan organise, direct, coordinate, report, and budget (Gulick and Urwick, 1937). To address whether managerialism is influencing the *manager* (the Head) it must then, this study argues, be distinguished from management.

Extrapolating from Bush's (1999) assertion that managerialism is management 'at the *expense* of educational purpose and values' (p240, *emphasis added*), key to making this distinction is identification of practices adopted *regardless* of functional need. Practices informed by managerialism are not simply the benign necessities of administering a school; technical requirements such as payroll, recruitment and timetabling, for example. Instead, managerialism twists these practices into different form. Under managerialism the *purpose* of management becomes performance. Practices exist and are privileged because (and perhaps only because) they extract more performance, more value and more commitment out of employees. Through managerialism an administrative task such as timetabling becomes a data-driven means by which to enhance efficiency. Educational purpose may not be (entirely) side-lined, but efficiency in these terms is about measuring and increasing capital utilisation (of teachers and physical resource) with the intention of leveraging productivity.

Importantly, despite assertions that educational practices in UK, US and Australian contexts now 'resemble those found in the private *for-profit* sector' (Deem, 2011:50; *emphasis added*), evident from the above is that managerialism does not require a commercial context to be applicable. A managerial practice can have its genesis in the corporate world without that practice being 'business-like' in the sense that it refers to the pursuit of profit. Managerialism may be found in for-profit *and* not-for-profit contexts because the associated practices improve efficiency, increase control and regulation, leverage more value from capital resources (teachers included) and because they focus attention on the market; none of these motivations necessarily relating directly

to commercial outcomes. Managerialism, by definition, takes *non-* (or *-pseudo*) commercial form by shifting the purpose of practice – a school may performance manage its teachers against examination results but that comparison, although educationally-orientated, remains managerial.

Table 3 offers a summary of the differences found across the literature (as discussed above) between practices and policies that might be seen to be representative of management, managerialism and commercialism, drawing attention to the outcomes, and, most importantly, to the underlying *purpose*, of each:

Table 3: Distinction between management, managerialism and business

MANAGEMENT	MANAGERIALISM	COMMERCIALISM
PURPOSE:		
Functional Outcomes	Performance Outcomes	Profit Outcomes
EXAMPLES/INDICATORS:		
Payroll, recruitment, work scheduling, logistics, collegial relationships with other schools.	Performance related pay, performance management, target-setting, benchmarking, contractualism, performance metrics, efficiency/value reviews, marketisation, collegiality within competitive terms.	Return on Investment, profit-seeking, shareholder value, aggressive competitive behaviours, Key Performance Indicators (KPI's).

While these domains cannot and should not be treated as mutually exclusive, the subtle differences are, I argue, important when investigating *managerialism*. That is, it is not enough to point to management tasks as axiomatically managerial; nor is it fair to accuse a for-profit school (or its Head) of being managerial as a result commercial motivations, that, after all, is the school's *raison d'être*. Conceiving of managerialism as sitting between functional necessity and commercial outcomes becomes, in consequence, an important analytic.

The value of this analytic is that it draws attention to (and might help researchers, myself included) to identify *managerialism* while avoiding conflation with the necessary requirements

of administering/*managing* an organisation (payroll, for example) and without suggesting that managerialism need necessarily have *commercial* orientations (profit share as a method of performance management, for instance). The use by international schools of, for example, Kaplan's Balanced Scorecard, SWOT²⁹ Analysis, Ansoff's Matrix, the various models of Michael Porter or Forced Ranking Appraisal Systems may be undertaken regardless of functional need and at the same time used non-commercially but that does not preclude their use being indicative of managerialism.

As established above, the literature also suggests that other indicators of managerialism include high labour turnover and short employment tenures (see: Travers and Cooper, 1996; Carlyle and Woods, 2002:x; Ball, 2003a:16; Boffey, 2015); finding the same in international school contexts would, therefore, suggest similar influences. In other works, Newman proposes that managerialism may also be exposed through culture (Newman, 1995). Resonant with Ball's professional- versus market-values comparison (2006), for Newman a more managerially aligned culture would bespeak narratives of (potentially non-commercial) competition, with emphasis (linguistically and practically) on performance management, short-term goals and successes, marketisation, customer-service and consumer satisfaction. In practical terms, this might translate as class size reviews, space utilisation audits, a leveraging of teacher timetable allocations and parent/student surveys.

Similarly, finding Heads using the language of business – 'management speak' such as 'clients', 'customers', 'vision', 'leading' and 'accountability' (Hoyle and Wallace, 2005:10) – would indicate the governing influences of managerialism without those terms needing to be adopted with commercial intent.

²⁹ Strengths, Weaknesses, Opportunity and Threats

Further signs of managerialism include the presence (or rather lack) of senior female managers. Women managers are often, though not without debate, associated with 'soft management' and male managers with 'hard management' (Ozga and Deem, 1996; Deem, 1997). With managerialism privileging instrumental engagement, competition, control mechanisms and the functionality of performance measurement, it is particularly seductive to the masculine subject (Usher and Edwards, 1994; Kirton and Greene, 2010; Pullen and Rhodes, 2015). The male subject, ready to engage with these discourses, thereby becomes the prominent player in management structures (Glaser and Slater, 1987; Witz, 1992). It is perhaps no coincidence then that only 6 of the 25 research participants for this study were female (and that by deliberate design rather than being representative of the market). As Croft and Currie (2015) found in their study of female nurse managers, it may be that a commitment to feminised identities strongly binds female teachers to educational subjectivities. Despite the increasing technical skills, academic education and management roles now required by *all* teachers (Dent and Whitehead, 2002; Ball, 2015), commitment to feminised identities perhaps compromises female teachers' willingness to take on Headship.

Research also suggests that under managerial regimes women who do take on management roles are colluded into masculinised ways of behaving (Casey, 1995) or pressured into displaying forms of compliance to masculine styles of management (Gleeson and Shain, 1999). What this suggests is that, if the antecedents of managerialism are found to exist in international schools, one might expect the subject positioning of male and female Heads to display similarities. This proposition is tested via data analysis in Chapter 5.

With exemplars of managerialism (as opposed to the necessities of management and the extremes of commercialism) laid out, it is worth reiterating that this study is not primarily concerned with the *incidence* of managerial practice at the level of the school. Revealing the

extent of managerialism within international *schools* is important and necessary – the more it is found, the greater the potential its influence and hold – but this project is more concerned with the ontological positioning of managerialism within the research subjects. That is, to understand how Heads may or may not be created, constrained or coerced by managerialism, it is important to explore how managerialism relates to professional identity. It may (or may not) be ‘out there’ but more important to this work is how, by what means, and with what implications, it is (also) ‘in here’.

3.2 THE PROCESSES OF BEING: PROFESSIONAL IDENTITY AND IDENTITY WORK

Taking Freidson’s definitions (1994; in Evans, 2008), this thesis uses the word *profession* to refer to an occupation that controls its own work through a set of institutions sustained by particular ideologies of expertise and service; *professionalism*, in turn, is used to refer to those ideologies. In these terms, professionalism is the identification and expression of the governing influences of discourse; of what is required and expected of members of a profession. These socially-derived ‘consensus of norms...apply to being and behaving as a professional within personal, organisational and broader political conditions’ (Day, 1999:13) and discipline the individual subject, the *professional* – here, the international school Head.

From this viewpoint, the boundaries of professional discourse seem to create a collective ‘professional conscience’ (Hodgson, 2005:53) where the narratives of the profession describe the expected practice and behaviour particular to the prevailing discourse/s, rewarding by association those who conform and punishing by disassociation those who dissent or transgress. Conceived as a conscience, it is, therefore, individuals who (operating from inside the collective) constitute a profession. Professionalism can be thought of as ‘an ideologically-, attitudinally-, intellectually-, and epistemologically-based stance on the part of an individual, in relation to the

practice of the profession to which s/he belongs, and which influences her/his professional practice' (Evans, 2002:6-7).

As this section explores, it is the characteristics and potentials of a reflective dialogic between an individual's ontology and professional discourses which present the need for and potentials of identity work. An individual professional may be subject to the professional conscience but they can also determine (to some degree) what *type* of professional they identify as. Understanding how and why individuals work at their professional identities, and establishing a theoretical position whereby this is possible, is consequently an important element of this study.

3.2.1 THEORIES OF IDENTITY

Within literature across various fields, there has been long debate about how the construction of identity actually takes place (see: Kunda, 1992; Hall and DuGay, 1996; Alvesson, 2001; Alvesson and Willmott, 2002; Dent and Whitehead, 2002; Collinson, 2003). In layman's terms, this construction comes via the combination of how others experience us and how we experience ourselves over time. It is a sense of *identifying* with or differentiating from certain groups of people through, for example, age, sex, class, ethnicity or intelligence. For this reason, identity is constructed in relation to the groups people belong to and compare themselves with. Identity work relates, therefore, to questions about personal self (who am I?) and collective or social identity (who are we?).

In more academic terms, identity construction is based on 'a set of ideas that defines [us] uniquely as individual human beings' (Knights and Willmott, 2007:65). Foucault, from whom much contemporary sociological thought owes its genesis, saw these sets of ideas as 'technologies of self' (Foucault, 1983:369), arguing that just as it is necessary to study the

production of objects it is also necessary to study the production of self. A 'veritable discursive explosion in recent years' (Hall, 1996 in Hall and DuGay, 1996:1) has exhaustively debated and deconstructed these 'technologies of self' (*ibid*) and questioned the origins of our unique sets of ideas. There remains though no single answer; no one theory or field holds a monopoly on what 'identity' is (or what it is not). The varied interpretations and deconstructions of identity, as listed by Collinson, include:

“...the philosophical approaches of existentialism (Sartre, 1958) and phenomenology (Schutz, 1972), the more sociological perspectives of symbolic interactionism (Mead, 1934), interpretative sociology (Weber, 1947) and social anthropology (Becker, 1971; Cohen, 1994) as well as the social psychological orientations of developmental psychology (Kelly, 1955; Allport, 1955) and psycho-analysis (Freud, 1930; Jung, 1964)” (Collinson, 2003:529).

At the extremes, theories on identity vary from Freudian psychoanalytic and structurally orientated approaches, which regard identity as stable and fixed, to sociologically action-orientated approaches that see identity as fluid and malleable (Kreiner, Hollensbe and Sheep, 2006:1317). The former, more traditional view, has tended to see our sets of ideas and, consequently, human essence in general, as 'unitary, coherent and autonomous...as separate and separable from social relations and organisations' (Collinson, 2003:1). The self, from this perspective, is conceived as a 'fixed, irreducible solid entity – the essential core of one's being' (Casey, 1995:3). In contrast, the latter school of thought, most notably pursued by Mead (1934) and Goffman (1959, 1967), rejects the view of a sovereign self and emphasises 'the social construction of self through dialectical processes and self- narratives' (Casey, 1995:3).

More recent poststructuralist theory takes this view further; critiquing modernist, structural perspectives for a dualistic tendency to separate the individual from society, mind from body and rationality from emotion. Framed within the poststructuralist lens of Derrida (1972), Foucault (1977, 1979), Giddens (1979) and Lacan (1983) the individual is seen not as one self but many: 'a chorus of continually evolving voices, not just a soprano or tenor' (Mishler, 1999:8). For these writers the self is a complex interweaving of individual interpretations and ever changing situatedness; the self is not free-standing, pre-social or asocial, it is a relational self (Frazer and Lacey, 1993). Nor is this 'social self' (Burkitt, 1991:2) simply influenced by the external world, rather, since for poststructuralists the self cannot be set apart from the social, cultural, political and historical contexts in which it is embedded, self is a metaphor between mind and matter, the interweaving of our internal and external worlds.

To arrive at a better understanding of identity as it is theorised within the extant literature, and, in particular, to establish which of the theories provides possible explanation for any uptake of managerialism beyond functional need, these major schools of thoughts are now explored and critiqued.

3.2.2 Salivating To Socialising – Behaviourism and Symbolic Interactionism

At their simplest, according to Knights and Willmott, structurally orientated perspectives view identity as 'a response to the pattern of stimuli received from the environment' (1999:62). Advanced by Watson (1913) and popularised by Skinner (1953), this Behaviourist perspective conceptualises human behaviour as the product of stimuli that elicit responses based on past conditioning (as in Pavlov's famous 1902 study of salivating dogs). Absent from the theory is any sense of human beings as interpreters of external stimuli, as moderators of their environment or agents in control of their actions – for the Behaviourist stimulus-response is all. Behaviourism, as

defined by Skinner (1974), therefore argues that free will is an illusion; human behaviour is reduced to reward seeking and punishment avoidance.

Viewed critically though Behaviourist interpretations are overly simplistic. Reliant on the Freudian notion of unconscious desire, behaviourism amounts, Chomsky argues (1970), to no more than an uninteresting truism. People may indeed 'respond positively to that which they find pleasurable and negatively to that which they find painful' (Knights and Willmott, 1999:66), but, as Mead (1934) argues, people also moderate their responses dependent on the *value* given to particular stimuli. Human beings do not simply *respond*, they also *reflect*.

This reflection sees actors 'select, check, suspend, regroup and transform meaning in light of the situation presented' (Knights and Willmott, 1999:69). The continual interaction and negotiation with the symbolic significance of particular stimuli produces what Mead calls symbolic interactionism:

“...it is by means of reflexiveness – the turning back of experience of the individual upon himself – that the whole social process is thus brought into the experience of the individuals involved in it” (Mead, 1934:134).

The writings of Mead, especially *The Philosophy of the Present* (1932) and *Mind, Self, and Society* (1934), focus on the 'self as a product of social relations' (Jackson and Carter, 2007:186), examining the function of language and the significance of the social self in the interpretive production of meaning. Mead's insistence on the inseparability of self from environment, and his pragmatic conception of a Self-Other relationship, sees human responses not as a behaviourist application of established meaning but as a negotiation of self with the (symbolically rendered)

significance of stimuli (or as Mead puts it, with the 'Other'). For Mead there is ongoing 'reflection-in-action' between an inner self (the I) and a more visible social self (the Me); the reflective 'I' 'guiding the performance of the Me (Mead, 1934:175).

From this perspective, who we take our self to be is very much a matter of the person we see reflected in the eyes of the Other, and we *manage* that image to influence how those others see us. Resonant of Goffman's *Presentations of the Self in Everyday Life* (the title of his 1959 book), this operates, according to Bilig (1987), most obviously when one is in the company of others, in a semi-obvious way with imagined others (readers of an e-mail, perhaps) and less obviously through rhetorical processes of self-reflection. What is presented then is the ideal self, the self the 'I' would like to be. The Behaviourist notion of a solitary, static and definable identity is, for Symbolic Interactionists, rejected in favour of a self that has its genesis in relations with Others and in communal, discursive actions. In other words, presentations of self are 'socially and biographically' situated (O'Connor and Scanlon, 2005:9).

In practice, these presentations involve conventions and dramaturgical disciplines, the pre-defined rules of which actors (implicitly) agree to live by. Actively engaged beyond mere stimulus-response, individuals incorporate social knowledge that influences their sense of self, and in so doing thus alter the very self through which that knowledge is interpreted. Identity-work generates *and* depends on *self*-consciousness. As Habermas (1992) states, 'symbolically mediated interaction allows one to *monitor and control one's own behavior* through self-referential cognition' (Habermas, 1992:179; *original emphasis*; in Dunn, 1998:207) - the individual acts as a self by symbolically stimulating and responding to itself from the standpoint of the Other. From the Meadian perspective, this capacity to be both subject *and* object is what defines the self. Social interaction is the genesis *and* output of a reflexive self. Cognition and

rationality are based on the self's ability to take the Other into account whilst determining, through internal mental deliberations, its *own* actions.

In other literature though, questions exist as to the extent that a self can ever rationally reflect on its self and, thus, the extent to which a self can ever be in control of its self. For poststructuralists (most obviously Foucault), to possess a self on which one can reflect suggests an innate, sovereign and agentic self and occludes the potential of discourse (and therefore relations of power) to cause a subject to act upon its self in *particular* ways. In contrast, Foucault argues, the self is not freed and emancipated by reflexivity but, rather, is governed by self-reflection into being a particular kind of self (Foucault, 1982) – a possibility that is now explored further.

3.2.3 Poststructural Understandings of Identity

As the above suggests, parallels can be drawn between Mead and the writings of poststructuralists. Both stress the importance of language, the dynamic character of social and cultural life, and the unstable relations of difference. However, for poststructuralists the subject does not exist *separately* from society but rather is brought into being only by societal measurement, classification, assessment and classification – by the power of discourse/s.

For Foucault (1966), the self cannot ever be outside of discourse, for discourse is all there is; there are only subjects of discourse, any sense of self, any sense of individuality, emerges from and is constituted by discourse. While Foucault does emphasise the social, organisational and historical contingency of knowledge, he questions (though doesn't entirely reject) the Symbolic Interactionist view of self as something over which the individual has control, the view that in

'actively...incorporating knowledge' (Elliot, 2008:11) the self can be *self*-determining. As Foucault states:

“...practices of [social] power *produce* subjects, for example, through normalisation, a process by which the eccentricities of human beings in their behaviour, appearance and beliefs are measured and if necessary corrected” (Foucault, 1977, 1979; in Collinson, 2003:528 *emphasis added*).

Foucault uses the word subject to mean 'subject to someone else by control and dependence and tied to his [*sic*] own identity by a conscience of self-knowledge' (1983:212; in Niesche, 2011:21). This is Althusser's 'mirror-recognition' (1971:168). It is through recognition that the subject is 'recruited' - subjecthood is freely taken and subjection is freely accepted by the good subject. In Althusser's account there is no 'before' subjection when the subject was an individual. Indeed, it is Althusser's (and, later, Foucault's) notion of 'always already' that Butler (and others) use to recognise the hail and transformation of the individual into a subject as simultaneous and inseparable – 'there are no subjects except by and for their subjection' (Althusser 1971:169; Foucault, 1980).

Whereas then for structuralists identity originates in consciousness, in the intending subject, for poststructuralists meaning is 'always already' (Derrida, 1967, in Spivak, 1997:i) present in language. In opposition to the structural view of language as a simple mirror of nature, poststructural thought recognises the contingency of experience and the de-centering of the human subject as the origin of perspective (Phillips and Oswick, 2012). Departing from Mead, poststructuralism therefore locates the self within interdiscursive regimes and highlights language not as a reflection of sociality by the *knowing* subject but as a recognition of the

discursive embeddedness of subjectivity itself (Usher and Edwards, 1994). Consciousness is not ordered by a pre-organised reality to which we attach symbols, but rather is actively and continually (re)constructed through meaningful interaction with individuals, with material objects and, ultimately, with the discourses attached to each of these “Others”.

From this stance, language becomes fundamental in the *production* of social reality: through language, ‘discourses produce and mediate organisational and social phenomena’ (Leclercq-Vandelannoitte, 2011:1247). Echoing this thinking, specifically in relation to gender but subsequently adopted across a range of disciplines, Judith Butler suggests that language ‘produces that which it names’ (Butler, 1993:7). Building primarily on the work of Austin and Foucault, Butler’s conception is that language is performative:

“...regulatory power produces the subjects it controls ... power is not only imposed externally but works as the regulatory and normative means by which subjects are formed” (Butler, 1993:22).

This is not the performativity, after Lyotard, of the marketised and corporatised work place that Stephen Ball (2003a) writes about. Rather this performative is borrowed from a debate between Derrida (1988) and Austin (1962) concerning the nature of language and its relationship to the world. Where Lyotard’s conception of performativity (see 3.1.3) is concerned with input, output and measurement, Butler’s differing treatment of performativity suggests that language ‘exercises a binding power’ (*loc. cit.*). The key is that discourse is that which *constitutes* rather than that which simply *denotes*. Words such as ‘managers’, ‘management’, and ‘managing’ (and in the context of this study, ‘Headship’) both convey *and* construct the very behaviours and actions they supposedly describe. Embedded in these words are authoritative discourses that

frame what those words *mean* (and what those who are called 'managers' must do), thus bringing ways of acting and forms of managerial identity into being.

Importantly, the two theories are not mutually exclusive. Both Lyotard's and Butler's conceptions of performativity hold true. If, as for Butler, the repetition by professionals of behaviours deemed authentic by a particular profession enacts the professional self into being and simultaneously creates and constrains professional conduct, it follows that a profession characterised by measurement will subject its members to the discourses of measurement. The extent of performativity, in both senses, to be found within the identity work of international school Heads is an important and as yet under researched enquiry.

Each of these conceptions also reveals important perspectives on power. For Lyotard, power is the *result* of action: effective performance (however defined) captures power (the self becoming empowered in regard to its positioning in relation to performance). In opposition, for poststructuralists, power is 'always already' (Derrida, 1967, in Spivak, 1997:i) in place and precedes (rather than results from) action. The recursive and reflexive formation of identity through 'the forced reiteration of norms' (Butler, 1993:94) is in no way predetermined 'but is nonetheless *always already* compromised by its formation through power' (Hodgson, 2005:55; *emphasis added*). Thus, for Butler and other poststructuralists, performativity regulates and governs subjects who are recognised and recognise themselves through its power (Foucault, 1977). As Holloway (1989) and Hodgson (2005) postulate, the discourses around a particular organisational position both produce and subject people (through their own actions and the actions of others) to specific discursive positions.

In these terms, discourse is a device for configuring thought. Discourse governs what is thinkable. Exhortations to 'think outside the box' merely lead to other boxes, to other discourses - 'to move

beyond discourse is to move into a space of unthinkability' (Paechter, 2007:73). Identity, therefore, is bound up with discursive power. The moment an individual undertakes to *perform* a particular position (Headship, for example) they become located within (and controlled by) the associated discourses. Identity work comes to be seen as reinforcing the hegemony of the rules and norms of discourse.

This position also focusses attention on intersectionality – the overlapping or intersecting identities that describe an individual (gender *and* ethnicity *and* sexuality, for instance). Individuals are disciplined around multiple subject positions, identities and allegiances (Nkomo and Cox, 1996); they are interdiscursively governed by multiple discourses. In light of this argument, it is important, in researching identity, to avoid declaring that a subject 'has' a particular identity (a managerial one, for example). Instead, as Watson (2008) argues, it is more appropriate to suggest that a subject is governed by significant elements of external and socially available interdiscursive identities. That is, any one aspect of self is not, and can never be, distinct from other aspects of that self (Sims, 2008); there is no 'pure' identity, only identities. Thus, in the analysis that follows it should be read that discussion of the different discourses available to school Heads – educational and managerial – are not either/or, nor are they the only identities available. These discourses (and the subject positions they govern) are simply the ones under focus in this study; other positions, other discourses and other (personal and professional) identities are available, each shaping the identities of a particular individual.

3.3 RECLAIMING THE SUBJECT

In its preclusion of notions of agency, for critics such as Habermas (1967), the denial in poststructuralism of a more tangible concept of self negates the possibility of accounting for dissent, destabilisation and the potential for bodily *self*-destruction. By confining agency to

discourse, the suggestion is that poststructuralists reduce the possibilities for self-reflection, offering a view of self that is de-historicised, de-socialised and entirely non-sovereign.

By situating the individual subject in the contingency of discourse and, in so doing, abandoning, or at the very least sidestepping, notions of an acting agentic subject, the very idea of a subject is rejected. At its extreme, poststructuralism refutes Descartes *cogito ergo sum* on the basis that the subject (Mead's 'I') is merely an effect of discourse. As Allen (2013) argues, taken so, the human is no longer the experiential centre of a course of action but the arbitrary effect of a set of discourses over which s/he has no control – a 'docile body' (Foucault, 1977:136). If all is discourse then reflexivity may reveal our own discursive reality, but it cannot emancipate us from it. As Dunn, using in part the work of Pheby (1988), notes:

“In structuralism, the subject lost its rational unity through a dissolution into ‘structures, oppositions, and differences’ (Pheby, 1988:51) that conformed to the universal operatives of language. In post-structuralism, the subject was further dissolved in the *instabilities* of language apparent in its actual practices and its substrata of desire and power” (Dunn, 1998:181, *original emphasis*)

For critics, 'discourse determinism' (Zembylas, 2003:110) is inadequate, however, because it 'leads to an almost behaviourist conception of the person as responding to power' (Ezzy, 1997:428 in O'Doherty and Willmott, 2001:470). Indeed, this so-called 'death of the subject' (Allen, 2013:22) has been challenged by what Foucault himself called a 'reworking [of] the theory of the subject' (Foucault, 2000:3). In contrast to the view of a non-agentic, inert self 'overwhelmed by social forces' (Hodgson, 2005:470), critics suggest a position where the self need not be entirely reduced to discourse. Habermas, for example, opposes a reduction of the subject's agentic power, preferring instead to see discourse as a 'medium of domination *and*

social force' (Habermas, 1967:259; *emphasis added*). Indeed, in his later works, Foucault refutes his supposed rejection of the subject - a position that Allen (*op. cit.*) suggests is, in any case, a misreading of Foucault's earlier writings - arguing that individuals *are* capable of taking up a critical perspective on discourse and that, within limits, individuals have the capacity for transformation of these discourses.

The problem with earlier readings of Foucault, Kelly (2013) highlights, is that people take him to be reducing subjectivity to a mere effect of structures, of structures to discourse, and discourse to power-knowledge. In neither case, Kelly suggests, is this reading true. Rather, Foucault's interest is in showing the *extent to which* subjects are the effects of discourses by bracketing (but not removing) the relative autonomy of the subject. That is, there is a fundamental and important epistemological difference between (1) people experiencing or confronting a discourse – in the case of this thesis, managerialism – and then, through the influences *of* that discourse and their influences *over* it, the subject constituting its self in varying ways and (2) the very discourse only being constructed as a result of people's *subjugation* to a reality over which they have no control. In opposition to the latter, post-dualistic understandings suggests cognition and rationality are based on a subject's ability to take into account discourses whilst determining, through internal mental deliberations, its *own* actions in relation to them - 'symbolically mediated interaction allows one to *monitor and control one's own behavior* through self-referential cognition' (Habermas, 1992:179; *original emphasis*; in Dunn, 1998:207). This capacity to be both subject *and* object frames the individual, through technologies of self, as 'a reflexive process that regulates the acting, *agentic organism*' (Callero, 2003:120; *emphasis added*).

Whilst discourses have the potential to be so restrictive that one can no longer see beyond their boundaries, making 'certain kinds of thought so much easier...that they outlaw others' (Paechter, 2007:75), discourses can also *empower* (in the case of gender equality, for example), and

speaking within a discourse can legitimise (in the case of scientific credibility, for instance). For Foucault, these capabilities exist in the form of what he called ‘technologies of self’ (Foucault, 1983:369); the means through which ‘the subject constitutes itself in an active fashion’ (Foucault, 1997:291), means Foucault called *subjectivation*. That is to say, whereas, in *subjection* the subject (the self) is taken to be passive, *subjectivation* refers to a more active sense of the ways in which a subject acts on and governs itself. Importantly, Foucault does not see technologies of self as something invented by the self; these technologies (these ways of being) are themselves discourses proposed, suggested and imposed by culture and society. Thus, Foucault allows the subject autonomy (agency) – both in the sense of the capacity for critical reflection *and* in the sense of a capacity for deliberate self-determination – but only so much as that subject is always bound up in power.

This literature offers an important view of how discourse and identity are treated in the research undertaken for this thesis. The position taken here is that identity work involves people being ‘continuously engaged in forming, repairing, maintaining, strengthening or revising the constructions that produce a sense of personal coherence and distinctiveness, an identity’ (Alvesson and Willmott, 2002:626). Discourses are not simply ‘social collections where shared meaning is produced, but rather also sites of struggle where different groups compete to shape social reality...in ways that serve their own interests’ (Mumby and Clair, 1997:182; in Hardy, Palmer and Phillips, 2000:1233). Thus, while an individual cannot, if they wish to appear legitimate, simply conjure a new discourse (instead, needing to locate their activities within meaningful prior context/s), they can take up and be empowered by one or more subject positions within the (‘always already’) discourses from which they can speak and act with authority.

3.4 POWER

Poststructuralism offers an understanding of the constructed and historical production of individual subjectivities as connected to and constituted through relations of power within and between discourses. Importantly, in order for individuals to be capable of leveraging these relations of power (the authority afforded them by one set of discourses or another) they must, according to Allen's (2013) reading of Foucault, be autonomous in some sense – they cannot be entirely docile. Minimally, power requires both the capacity to critically reflect on relations of power and the capacity to affect (however minutely) those relationships. Hence, far from being a repressive force, Foucauldian thought argues that power is productive in that it produces individuals, identities, behaviours, beliefs and forms of subjectivity. As Foucault writes:

'Power applies itself to immediate everyday life which categorises the individual, marks him by his own individuality, attaches him to his own identity, imposes a law of truth on him which he must recognise and which others have to recognise in him. It is a form of power, which makes individuals subjects' (1982:781).

Instead of a subject-agent binary, post-dualistic understandings see the individual as simultaneously subject *to* discourse and able to make choices *about* and *between* discourse (Willmott, 1994). Indeed, Stephen Ball warns of reading Foucault's ideas within the confines of traditional views of power as 'dangerously misleading and one-sided' (2013:4), stressing that Foucault is as much concerned with the modalities of freedom as he was with the production of docility. 'Power is not something that is acquired, seized or shared, something one holds on to or allows to slip away' (Foucault, 1981:94), but rather 'the term 'power' designates relationships

between partners' (Foucault, 1982:786). Power is not the relationship itself, but rather the capacity within the relationship to bring about transformation.

The issue of analysis then is one of recognition *of* and engagement *with* relations of power.

3.4.1 Recognising Power in Action

By way of illustration of how one might recognise power in organisations, Collinson (in work strongly resonant of Goffman) offers a view of three types of subjectivities that employees use as survival strategies - *conformist*, *dramaturgical* and *resistant* selves (Collinson, 2003). Each of these types is useful in examining how individuals engage with and exercise power. Key is that Collinson is not suggesting conformance, resistance or performances *against* power (thus seeing the subject as object), rather that each of these subjectivities represents the achievement of interdiscursive power *through* various forms of identity work, as both subject *and* object.

Resistant Selves: The resistant self is the most overt manifestation of contingent power. Often cynical, loud and brash, miserable and quick to moan, the resistant self declares itself, through word or deed, outside of the prevailing discourse and attached to/empowered by others. For Alvesson and Willmott (2002) such resistance can be covert and subterranean, or may rest in expressions of irony or satire. Individuals perform a particular discourse, and resist others, because they experience subjectification through, and thus exercise power through, the former. Hence, whatever its form, each word or deed of defiance is, for the resistant self, an act of (empowering) micro-emancipation, the capturing of self-respect or a positive sense of *self-identification* distinct from that offered by the dominant discourse (Collinson, 2003).

Conformist Selves: The conformist self, Collinson notes, is preoccupied with itself as a valued subject in the eyes of those in authority. The identity work of conformist selves often manifests as careerism. In highlighting conformity, Collinson progresses Foucault in emphasising the self-disciplining aspects of workplace cultures that 'tie individuals to their identities' (Collinson, 2003:536) and 'reinforce the regimes of truth [that] make self-recognition possible' (Butler, 2005:22). However, by conforming to particular discursive subjectivities an individual may be subjecting themselves to power but, at the same time, from that subjected position the conformist self also captures, albeit perhaps unknowingly, the power of the very discourse to which it is subject. From inside the discourses of education, international school leaders gain professional legitimacy and therefore the right to act in the professional interest (and, furthermore, to determine what that interest is). Conformity may, on the surface, seem *disempowering* but a poststructural understanding reveals its *empowering* properties; to speak within a discourse is to exercise the power of that discourse.

Dramaturgical Selves: Here, the gaze of the organisation creates a degree of self-consciousness, which in turn yields 'skilled manipulations of self, reputation and image' (Collinson, 2003:538). Through a choreographing of their own practices, rather than unquestioning conformity, individuals strive to present themselves in a favourable light. On the surface such performances might be seen as acquiescence to power, however, by seeking through skilled performance to capture the very discursive power it is performing, the dramaturgical self is actually seizing power (or at the very least avoiding the discursive discipline of non-performance).

Fundamentally, these three categories of resistance should not be reified in their application. With a poststructuralist understanding of identity capturing the multiple, ambiguous, shifting and contradictory nature of selves, so too it captures the fluidity with which individual selves

engage or resist discourse(s). Consent, resistance and dramaturgy may be present at different levels of individual consciousness at any one time, each unknown by the individual self enacting them. These are also not the only types of power; nor Collinson's the only theories of subjectivity. A commonly adopted typology of power is that by French and Raven (1959) who identify five forms of power: legitimate, reward, referent, expert and coercive. Pfeffer (1993) offers a useful review and extension of these, and other, types of power, drawing out the interrelations between each. Collinson's subjectivities are, however, those recounted here because they best elucidate the arguments above and because resistant, conformist and dramaturgical selves more readily align with poststructural thought.

In summary, poststructural theorists have considered for some time the question of how identities, subjectivities or 'selves' are constructed, monitored and resisted in the workplace, given discursive regulation (Casey, 1999; Alvesson and Willmott, 2002; Collinson, 2003). Studying 'selves at work' or employee *subjectivities*, defined as feelings, values, self-perceptions and cognitions (Alvesson and Deetz, 2000), challenges researchers to see people as both subjects and objects, not passive entities fully determined by external forces or structures, nor fully self-controlling agents shaping the world around them (Collinson, 2003). Commensurately, while discourse can be seen as a mechanism of control, encouraging individuals to regulate their identities in line with discursive rules, discourses can also be empowering. As explored, individuals can, through identity work, derive a sense of self from the discourses of professional status (Turner, 1988) and, drawing upon discourses (including alternates to the prevailing norms), individuals can also engage, across multiple 'strategic skirmishes' (Ball, 2015:3), with discursive power.

Importantly, this theoretical stance adds weight to managerial appeal. As the individual struggles for meaning and, in particular, as the *manager* struggles to assert and maintain organisational

power, managerialism offers a seductive and powerful discourse available for appropriation by discursive beings as they work at their (professional) identities. The challenge, as will now be explored, is how the subject retains 'traditional' legitimacy whilst also capturing 'new' authorities across plural and interdiscursive relationships of power.

3.5 THE PROCESSES OF IDENTITY WORK

While acknowledging the contested interpretations of Foucauldian theory (above), if one believes that *as well as* subjecting the individual to an embodied regulatory effect, that individuals can also draw, more agentially, on discourse to constitute themselves (albeit only into other subject positions), it becomes important to consider the processes by which this occurs. Those processes, in practical terms, being that of ongoing and lifelong *identity work*:

“...the mutually constitutive processes whereby people strive to shape a relatively coherent and distinctive notion of personal self-identity and struggle to come to terms with and, within limits, to influence the various social-identities which pertain to them in the various milieu in which they live their lives” (Watson, 2008:129).

In other words, identity work refers to the dynamic, narrative processes through which individuals 'shape, manage and constitute their concept of self' (Watson, 2008:122), 'forming, repairing, maintaining, strengthening, or revising' (Sveningsson and Alvesson 2003:1165) 'fluid, momentary, transitory, and relational' (Whitehead, 2010:1) meaning to their lives. Through actions, habits, postures and language, identity is something that we each *work at* in order to

create, sustain and present a sense of self, both as individuals and as parts of societal collectives (Snow and Anderson, 1987; Einwohner, 2006).

The intention of this section is to consider the interdiscursive regime within which Heads undertake the *professional* elements of their identity work – specifically in regard to educational and managerial discourses. Taking poststructuralism as its theoretical basis, this analysis is undertaken, firstly, through an analysis of professional identity; and, secondly, through consideration of how individuals are governed by, and move between, various ‘always already’ discourses (the plural being key) as hybrid professionals.

3.5.1 PROFESSIONAL IDENTITY

The relationships between the professions and organisations have been a concern of organisational studies for a number of years. Writing over three decades ago, DiMaggio and Powell, in their now seminal 1983 text *The Iron Cage Revisited*, acknowledge the significant influence of professionals on organisational structure and form. Scott, whose work owes a debt to DiMaggio and Powell, goes so far as to describe professionals as ‘the preeminent institutional agents of our time’ (2008:219). Being a professional not only involves learnt professional expertise but also *enactment* of the professional order. To be part of a particular discourse community, to share a social identity, in other words, to belong to a professional order and be seen as a particular kind of professional, one must (inter)act as that professional, one must ‘play the part’ (Hodgson, 2005:53 *original emphasis*). Citing the works of Grey, and Fournier, Hodgson goes on to argue that:

“...membership of a profession serves to construct a specifically governable subjectivity rooted in self-disciplinary mechanisms (Grey, 1998) such that professions are both the instrument and subject of government, the governor and the governed...”
(Fournier, 1999:285 in Hodgson, 2005:53)

To attain (and retain) group membership, individuals self-govern through the collective imagery of desired identities (Croft *et al.*, 2015). This requires identity work disciplined by how an individual is perceived by others (Alvesson and Willmott, 2002; Sveningsson and Alvesson, 2003; Watson, 2008), with successful belonging demanding that an individual’s identity claims are seen as legitimate by current membership (Brown and Toyoki, 2013; Pritchard and Symon, 2011). This is not, however, a necessarily straightforward process. What it means to be a professional is dynamic, forever in flux and open to subjective interpretation. How individuals construct desired identities depends on multiple and plural social contexts (Alvesson, 2001; Sveningsson and Alvesson, 2003), and results in multiple identity narratives. Such narratives, and the security they offer, may only be temporary, reflecting and affecting *self*-perception dependent on shifting forms of professionalism, but they are nonetheless important in the search for purpose and meaning (Ashforth, 2001).

The term *professional* thus connects with issues of personal legitimation and validation, and informs a sense of identity that serves to affirm and validate the self. In the search for life’s meaning being *professional* offers an ontological location whereby the professional (in this study, the Head) is protected (to some degree) from existential angst through the narratives and discourses reifying professionalism. Seen as such, being a professional is seductive, and understandably so. To avoid the discipline of disassociation with professional status workers will work harder and be more conscientious, all in the service of being seen as acting professionally.

With identity reified through association with professionalism (at least seemingly so for the subject concerned), being professional appears to act in the subject's interests and becomes internalised, while at the same time placing the subject under increased professional scrutiny. In short, in pursuit of professional identity the individual has more at stake than material loss or gain; to be denied professional identification is to be denied the ontological benefits of *belonging* (Dent and Whitehead, 2002). This presents the potential for identity conflict.

Identity conflict appears when an individual feels that their actions are incongruent with those considered legitimate, or when they feel unable to sustain multiple identifications (Petriglieri, 2011). When faced with identity conflict, individuals work to create a sense of coherence, moving between multiple identity constructions as both context and their own ontological needs allow/demand (Sveningsson and Alvesson, 2003). Despite the allure of professional status then, the pressures driving professional identity formation are not necessarily benign. The insertion of ideologies into a field – managerialism, for example - is not neutral but packed with ideational aspects guiding professionals to perceive and act in certain ways. Indeed, as has already been noted with regard to education, a culture of performativity (and neoliberal discourse in general) seems to be prescribing/demanding a form of professionalism infused with managerialism. As Dent and Whitehead argue, within contemporary managerial-professional configurations for professional status to be legitimised it has to be enacted on the basis of and/or validated by 'scientific' knowledge (2002:8). In other words, the professional must succumb to prescriptions of measurement against performative criteria before they can truly be seen to enact professional status. As Dent and Whitehead emphasise:

“The professional's account is no longer sufficient of itself and must be measured and inspected against external criteria or targets of performance, all of which purport to be 'scientific'

and thus accurate and dispassionate, not open to question or doubt as models of 'truth'" (2002:8)

These criteria and targets, echoing Foucault's 'technologies of surveillance' (1970, 1972), act therefore to discipline the professional subject into particular forms of professionalism. As Power (1997) asserts, the emergence of performativity and managerialism have undermined assumptions concerning professional accountability and autonomy in favour of professionalism performed in the name of the client, customer, patient, or student. The attitudinal development required to enact these (new) forms of professionalism occurs over time through a combined process of gradual replacement of norms and through the regenerative process of replacing established professionals with newcomers who know little different; the 'new' eventually becomes so taken-for-granted that it defines the professional conscience.

This is not, however, an unequivocally subjugating process. There may, in some cases be identity conflict, but, in other cases, identity work results in positive, reproductive change for individuals (Thornborrow and Brown, 2009; Wright, Nyberg and Grant, 2012). Indeed, conflict itself can be generative. The individual who can 'read' interdiscursive conflict and locate his or her self accordingly might be best able to exercise power - over self and over the profession. This is a powerful narrative ethic that makes possible the restoration of individual agency within and against the professional order. The discourses of a profession may govern identities, but those same discourses (and their fluidic nature) are available for subjective appropriation by discursive beings as they *work at* their identities, allowing them to accommodate new identities without sustained identity conflict (Ibarra, 1999). Consequently, although there is a danger that professionalism may be disabling (because of the potential for increased subjugation), the ability to converse fluently in and to mobilise its discourses can be a source of ontological and

occupational protection and thus of professional confidence, especially in contexts where exactly what it means to be professional is contested.

These conceptions provide an important epistemological basis and a reference point for empirical analysis highly relevant to this study. In constructing the professional, discourses give power to those who identify as, and can perform as, whatever form of professionalism is contingently privileged. Consistent with Collinson (2003), professional power (and therefore professionalism) can be seen to evolve as individuals undertake identity work through resistance, compliance and contestation with evolving professionalism and as they oppose or embrace new modes of professional being.

3.5.2 Performing as a Professional

Applied to education, the view of professionalism described above shows how authentic performances of Headship 'rule in and rule out' (Black, 2005:1) certain professional behaviours. Heads are governed by the sense of belonging and the empowering sense of self gained from collective understandings of *traditional* (i.e. educationally focused) Headship. If nothing else, with their occupational genesis being in the classroom, the legitimacy of 'traditional' Headship has the potential to assist Heads with the process of 'slowing down and solidifying the flow of the world in temporal and spatial terms' (Hassard, 1993:13) – it gives Heads a tool to use as part of their identity work. Faced with uncertainty the most natural recourse is for a Head to perform the role they know best and the role they know is accepted and legitimate, that of educationalist. In this regard, as both Hargreaves (2000) and Sachs (2003) have argued, identification as an educational professional is developed through qualification, training and socialisation processes associated with 'caring, human nurturance, connectedness, warmth and love' (Hargreaves, 1994:175). Teachers, the literature suggests, think about themselves as devoted to students',

tending in their approach to organisational life to safeguard the educational relationship with pupils (Hargreaves, 1998; Zembylas, 2003; Lasky, 2005) continually asking themselves: is what we are doing in the interests of the children and, if not, how can we make sure that we do act in the interests of the children (Tateo, 2012)?

With specific regard to school Heads, while the conclusions to be drawn from much of the literature – including Gulick and Urwick (1937), Harry Wolcott’s (1973) *The Man in the Principal’s Office*, Kelley and Peterson (2000), Hoppey (2006) and Oakley (2011) – suggest a similar focus on caring, it is evident that Headship cannot be easily distilled into a singular set of practices. Over time, as a teacher rises up the management ranks eventually reaching Headship, the role grows to include administrative functions such as planning, organising, staffing, directing, coordinating, reporting, and budgeting, later evolving further into engagement with responsibilities for curriculum direction (as opposed to delivery) and more scientific forms of leadership (Nettles and Herrington, 2007; Kafka, 2009). In reaction to criticisms of excessive bureaucracy, other literature points to Headship now including, in theory at least, greater emphasis on teaching and learning, professional development, the development of effective curriculum and instruction, and strategies to improve educational achievement (McGurty, 1983; Dwyer, 1984); the role becoming that of ‘instructional leader’ (Hallinger, 1992; Beck and Murphy, 1993)³⁰. Contemporary Heads, alongside their more functional executive role, are expected to set high expectations for teachers and students, supervise classroom instruction, coordinate the school’s curriculum, and monitor student progress (Blase and Blase, 1998).

Highlighting professionalism ‘in action’ these insights illuminate how professional identity is experienced, enacted and validated. For example, evolved through the traditions of the

³⁰ Instructional leadership can be defined as ‘those actions that a [Head] takes or delegates to others, to promote growth in student learning’ (DeBevoise, 1984:15).

profession, the discourse of 'student first' (Tateo, 2012) can, very much be seen in this light. When one becomes a Head, one must, if one wishes to belong to the professional order, allow oneself to be disciplined by this discourse; as a constitutive element of the field, putting the 'student first' must be part of a Head's identity³¹. Where a teacher may spend their days with students, a Head must maintain that it is 'about the students' even while undertaking a role that may see them rarely in contact with those students. Headship may be plural in purpose but as advocated by Hodgson (2005), so strong is the ontological appeal of educational discourse that the self is intensely seduced by (and subjugated to) educational power. By casting tasks that are not 'about the student' as outside of their professional role, Heads can defer, deflect and delegate these undertakings to others (and to other professions), claiming that such tasks are not what professional Heads (should) do. For Heads, being marked as a 'professional' signifies a more significant moral stance than mere 'manager'³².

Yet, as Dent and Whitehead (2002) highlight, and as countless organisational actors are likely only too well aware, the solidity of these professional performances often turns out to be at best elusive, and at worst, a fiction sustained in part by the professional's own silence and complicity. In short, despite having the capacity to ontologically ground (and discipline) organisational members in the rules of the larger collective, the seductions of professionalism exist as a discourse within the professional's imaginings. The first rule of membership of this collective, for *professional* players, is that they must never speak of the emptiness and paucity of purpose at its heart, for to do so puts all at risk. A Head may know that their role is less 'about the student' than they claim, but, for fear of being professionally ostracised, they are highly unlikely to admit it. As Gleeson and Shain suggest 'one interpretation of such mediation is to view

³¹ Note that the suggestion here isn't that student shouldn't come first, the attempt is simply to highlight a discourse to which Heads attach their identities. Equally, perhaps that it just my own educational identity writing, unable to give up such a strong element of my own professional identification I too am bound by the 'student first' narrative.

³² This begs the question of whether the designation manager denotes a profession and a particular kind of professionalism. Despite numerous *management* qualifications, associations and symposiums that lay claim to professionalism I would suggest that if professionalism is defined by exclusion then adoption of the title 'manager' is too commonplace for it to offer the necessary distinctiveness. Indeed, building on Grey's observation that 'we are all managers now' (1999:1), surely we cannot all also be professionals?

[professionalism] as an artful form of *self-preservation*' (1999:488; *emphasis added*). This does not grant professionals immunity from change (not least of all from managerialism), but holding onto the traditional (educational) discourse of 'student first' helps Heads to (potentially) slow down and solidify the fluidity of shifting professionalism.

On the one hand then, in terms of observable practice, Heads are required (by virtue of professional experience and expertise) to retain credibility as specialists occupying an important classroom-focused (if not classroom-based) role. On the other hand, they are also expected to perform as managers. As various studies have found, the practices of Headship require, and have always required, a detailed knowledge of pedagogy alongside also demanding management knowledge (Eraut, 1994).

However, notwithstanding those findings, there are also claims that contemporary Headship is more complex than the demands placed on Head *teachers* of old (e.g. Hallinger, 1992; Leithwood and Riehl, 2003; Matthews and Crow, 2003). Contemporary Heads report role conflict as they try to assist teachers with the complex work of teaching and learning and simultaneously meet competing managerial demands (Hallinger, 1992; Beck and Murphy, 1993; Crow, Hausman, and Paredes-Scribner, 2003). Blumberg and Greenfield (1980) summarise these tensions:

“While many Principals might dream of being effective instructional leaders by enhancing the activities of teaching and learning in their schools, in reality their experience is shaped by the press of administrative and managerial functions that mitigate against that dream becoming reality”. (Blumberg and Greenfield, 1980:123)

In discourse terms, the literature describes this process as neoliberal *colonisation* (Fairclough 1989, 1995), the addition to (or replenishment of) traditional values with beliefs based on the market and competition (Black, 2005). Thus, whilst the talk of many teachers relates largely to student access, equity, individual need and personal development (Chappell, 1998) this is in sharp contrast to managerial influences on Headship and the resultant demands on Heads, both occupationally and ontologically (Chappell and Johnston, 2003). The outcomes of these demands, according to Dent and Whitehead, is that ‘the manager has become professionalised, the professional has become managerialist’ (*op.cit*:6).

3.5.3 Professional Educator, Manager(ialist) or Both?

To examine how the influences of managerialism are imbricating with educational discourses to construct the Head as professional, examination of the UK’s *National Professional Qualification for Headship (NPQH) Competency Framework* is illustrative. The NPQH may be UK-centric but, in the absence of models specifically dealing with international schools, its use is instructive. Moreover, independent of context, it is also analytically valuable, revealing how managerialism may get ‘inside’ the subject:

Table 4: UK National Professional Qualification for Headship Competency Framework (2014)

STRATEGIC LEADERSHIP	EDUCATIONAL EXCELLENCE	OPERATIONAL MANAGEMENT
Self-awareness and self-management	Delivering continuous improvement	Efficient and effective
Personal drive and accountability	Modelling excellence in teaching	Analytical thinking
Resilience and emotional maturity	Learning focus	Relationship management
Conceptual thinking	Partnership and collaboration	Holding others to account
Future focus	Organisational and community understanding	Developing others
Impact and influence		

National College for Teaching and Leadership (2014)

Within the NPQH framework, the requirements for ‘modelling excellence in teaching’ and for a ‘learning focus’ are clearly signifiers of educational discourse, of what might be considered a focus on the management of traditional practice. In requirements such as ‘self-awareness and self-management’, ‘holding others to account’ and the (Lyotardian) performative requirement to be ‘efficient and effective’, there are also signifiers of managerialism. Signifiers not just of managerial *practice*, but, more importantly, signifiers of identity, of shifted purpose and shifted ways of *being*. The Head, as *manager*, is required to embody and model not just educational excellence but must also articulate a vision of performance (Courtney and Gunter, 2015). Finding Heads articulating such requirements in the language they use to describe their roles and their selves would, therefore, be significant in revealing which discourses, educational and/or managerial, are most salient in their professional identifications.

Other potential signifiers can be found in the *UK National Standards of Excellence for Headteachers* (NSEfH) (gov.co.uk, 2015). To achieve ‘excellence’ Heads are required to:

“Sustain wide, current knowledge and understanding of *education* and school systems locally, nationally and globally” (*op.cit*: 5; *emphasis added*)

Yet, Heads are also required to engage with managerialism:

“Model *entrepreneurial* and *innovative* approaches to school improvement, leadership and governance, confident of the vital contribution of internal and external *accountability*” (*op.cit*: 7; *emphasis added*)

For this reason, while grounded in education, adoption of the terms *entrepreneurial* and *accountability* very much reverberates with the tendency of neoliberalism to locate professionalism within the discourses of managerialism and for those discourses, as Foucault suggests, to govern behaviour. Describing the effects of such discourse, Miller and Rose (1990) point to managerialisms transfer of entrepreneurial forms onto individuals where self-determination becomes a key economic resource and a disciplining technique – a discourse it appears is being directly leveraged in both the NPQH and NSEfH. Professional self-esteem in this regard is strongly linked to self-assessment; the self is governed into continuously self-measuring, self-judging and self-disciplining in order to achieve ‘vital ... internal and external accountabilities’ (Rose, 1990:81). If Heads wish to prove themselves as excellent professionals, they must not only *submit* to these accountabilities they are required to ‘model’ a ‘vital contribution’ to these conceptions of professionalism.

Finding similarly, Biott and Rauch (1997; in Western, 2008) describe the professional journey to Headship as one where the preferred identity is as a shaper, developer and leader of professionals within collegial schools, but also cited relentless pressure of administration, marketisation and bureaucracy as distractions from this preferred role. That is not to suggest that Headship is no longer about education (educational excellence is, after all, one of the three strands of NPQH competence) rather that the *purpose* of Headship is not simply or solely about teaching and learning.

The result of these changes, also found in extant literature examining non-educational contexts (Driver, 2012; Petriglieri and Stein, 2012; Tee, Paulsen and Ashkanasy, 2013), is that moving into roles which require the construction of management subjectivities is an emotional undertaking, challenging traditional/prior professional identifications. Addressing this point from an

educational perspective, Stephen Ball highlights the conflicted reality with which Heads must deal, contrasting professional values with market values:

Table 5: Professional versus Market Values (Ball, 2006:25)

PROFESSIONAL VALUES	MARKET VALUES
Individual need (schools and students)	Individual performance (schools, teachers and students)
Commonality (mixed-ability classes/open Access)	Setting/streaming/ selection; differentiation/ hierarchy/exclusion
Serves community needs	Attracts clients
Emphasis on resource allocation to those with greatest learning difficulties	Emphasis on resource allocation to more able
Collectivism (cooperation between schools and students)	Competition (between schools and students)
Broad assessments of worth based upon varieties of academic and social qualities	Narrow assessments of worth based on contributions to performativity
The education of all children is held to be intrinsically of equal worth	The education of children in relation to cost and outcomes

As the table suggests, Ball's analysis places the educational manager under dual scrutiny as they address the balance between educational and market values - between, in other words, different discourses as they constitute the profession/al³³. Where, as Chappell argues (1998), the learnt practices of teaching (the professional values) privilege student access, equity, individual need and personal development, for Ball (2006), the transition to Headship gives prerogative to (the market values of) performance, competition, management and, potentially, to managerialism.

In summary, educational discourses may be a significant component of the collective conscience and they may therefore be seductive, but, as the account of contemporary Headship above attests, those discourses are not singular. There is no longer (if there ever was) a 'true

³³ These, of course, are not the only discourses through which Heads are made subjects (others such as morality, community, social well-being and spirituality all, to varying contingent degrees, also serve to construct Headship) they are simply those most relevant to this thesis.

professional', that identity configuration is increasingly subsumed under competing discourses about what appears within the professional order, most notably managerialism. For the individual professional, conformance to professional prescriptions is therefore complicated because 'the adoption of a policy or practice that sends a favourable message to one audience may simultaneously send an offensive message to another' (Heimer, 1999:18). By adhering to one rule the professional risks breaking others, a breakage that might require reconciliation both in terms of how that professional is perceived by others (across the field of education) and how they perceive themselves (their sense of identity as a Head).

This places the individual, and the manager particularly, in an arena of latent and potentially overt contestation. Subjectication is experienced through the grain of existing and dominant discourses but also through a variety of sometimes overlapping, sometimes conflicting, and sometimes empowering discourses that may go against the grain. Consequently, the 'professional' finds a range of identifiers available to them as part of their professional identity work. Some of these identifiers may be more risky than others, some may bear on, or be drawn into, professional identity work in more meaningful ways and others more marginally, each though, offers particular relations of power which govern what is ruled in and what is ruled out of the profession of Headship.

With these findings in mind, it is these conceptions of professionalism, and Ball's contributions in particular, to which the research component of this thesis turns in seeking to identify which discourses seem to most readily construct the manager-subject, the Head. Finding international school Heads talking of market values would, for example, suggest the constitutive effects of managerialism, and *vice versa* the discourses of education. Where Heads place these values, 'in here' or 'out there', further helping to identify their occupational and/or ontological meaning.

3.5.4 OUTCOMES: THE HYBRID PROFESSIONAL

As the analysis above reveals, contemporary literature recognises that professionals often, perhaps even typically, are simultaneously constructed interdiscursively; each set of discourses prescribing different, perhaps complementary or perhaps contradictory, sets of professional forces and/or agentic possibilities (Kraatz and Block, 2008; Reay and Hinings, 2009). In fields characterised by pluralism the notion of professionalism is associated with composites of different discourses normally found separately (Fischer and Ferlie, 2013) - a characterisation, as Ball's (2006) professional- versus market-values observation suggests, representative of the current state of play in education.

Played out at level of institutions through the politics of professionalism and at an individual level through the politics of identity, the implications of professionals being governed interdiscursively have prompted an academic focus on *hybridity* - professionals within an area of expertise who develop relational capability (ontological and/or occupational) across multiple discursive positions (Noordegraaf, 2007; 2011; Waring and Currie, 2009; O'Reilly and Reed, 2011). Indeed, where prior literature has viewed professionalism and managerialism as opposed (see, for example: Elliott, 1996; Randle and Brady, 1997; Clarke and Newman, 1997), the attention being given to hybridity suggests that contemporary theory has moved on somewhat.

According to the literature, the primary antecedents of hybridity appear to be fundamental transformations within an industry. These drivers may be i) economic, a necessary realignment of professional focus resultant of new market conditions (the downsizing which followed the 2008 recession requiring professionals to take on additional tasks and roles, for example); ii) a reaction to new possibilities which shape the work of professionals (the data-rich environment in which many professionals now work being an obvious example); or, iii) field-wide shifts in

values, norms, and expectations (for educationalists, changes in professionalism and the managerial environment resultant of NPM, for instance). Most contested, and as yet the least well-developed in extant literature, are the micro-level processes of the latter of these drivers: the implications for individual professionals resulting from discursive modifications in what it means *to be* a professional and, in turn, how identity work is itself implicated in the creation of hybrid forms of professionalism.

This section addresses, firstly, the ways in which current literature treats hybridity and, secondly, establishes that there are gaps in that treatment for further contribution. In particular, linkages are drawn between institutional work, hybridity and identity work, and how these affect professionals. The section finds, specifically, that institutional work offers a useful lens with which to view, understand and analyse identity work within professionalism and suggests this connection as an important, and as yet under researched, form of enquiry.

3.5.5 Exploring Hybridity

Hybridity is an enticing idea in current studies of the professional; its allure lying in the potential to provide a way out of binary thinking, give agency to the professional, and even permit a restructuring and destabilising of power. In light of these potentials, theories of hybridity are finding a degree of contemporary traction.

To date, Miller, Kurunmäki and O’Leary (2008), Skelcher (2012) and Skelcher and Smith (2015), each argue that hybridity has been predominantly understood as *structural hybridity* with a focus on governance, markets and networks. That is, since the 1980s, the retreat of ‘pure’ public sector forms and increasingly porous boundaries between actors, organisations, and sectors (Dunleavy and Hood, 1994) have given way to the influences of public–private partnerships, contracted-out

service delivery structures, quasi-autonomous agencies, user-managed public facilities and systems of network governance (e.g. Kickert, 2001; Koppell, 2003; Skelcher, 2005; Sørensen and Torfing, 2009; Smith, 2010). Hybridity and hybridisation have been used by scholars to make sense of these influences (Christensen and Lægreid, 2011). As far back as 1990, Aucoin's analysis of public sector organisational reform in Britain, Australia, and New Zealand in the 1970s and 1980s highlighted the hybridic effects of opposing ideas on public sector design, particularly the primacy of (private sector) managerial principles over (public sector) bureaucracy. The result of this research, and the vast array of NPM literature that has followed, places hybridity within a now well-developed theoretical tradition (e.g. Alford and Friedland, 1985; Kraatz and Block, 2008; Thornton, Ocasio and Lounsbury, 2012) which understands plurality as leading to hybrid organisational, governance and management structures (Billis, 2010; Pollitt and Bouckaert, 2011).

However, despite this attention, as Brandsen, van de Donk and Putters (2005) and Spyridonidis *et al.* (2015) point out, the relationship between hybridity and identity remains relatively under-theorised. Current theory treats *individuals'* hybridity only obliquely, indirectly highlighting its potential within plural structural contexts (Noordegraaf, 2007) – and then often only as a side note to macro political or industry-level influences. Thus, with structural theory offering little guide, Brandsen *et al.* argue that the focus of scholarship should be to explore whether and how these macro-level dynamics shape the micro-level processes whereby an individual's identities are constructed and reproduced. Denis, *et al.* (2015) call for a similar approach, suggesting attention be paid to the tensions and possible contradictions between different analytic levels, such as between hybrid organisational forms and identity work.

Perhaps in light of these calls, extending key texts on structural hybridity (e.g. those by Lawrence and Suddaby, 2006; Lawrence *et al.*, 2009) a June 2015 special edition of *Public Administration*

on the topic 'Understanding Public Hybrids' moves current theorising forward somewhat. Based on a range of insightful papers (by, amongst others: Skelcher and Smith; McGivern *et al.*; Denis *et al.*; Spyridonidis *et al.*; and Croft *et al.*) the journal addresses, as Denis *et al.* summarise: "(i) governance forms; (ii) the institutional dynamics of hybridity; (iii) the social interactions behind hybridity; and (iv) individual consequences of hybridity for roles, work practices, and identities" (2015:275).

It is the studies which address hybridity and identity – the works of McGivern *et al.* (2015), Skelcher and Smith (2015) and Spyridonidis *et al.* (2015), for example – that are of primary interest here. These papers find that the professional who moves into a managerial role is seen to be engaged (to a greater or lesser extent) with the practices of the profession whilst also engaging in practices related to management and managerialism (e.g. a teacher becoming a Head, a doctor becoming a Clinical Director, a professor becoming a Vice Chancellor). In these studies, actors are seen as situated, taking identity and meaning from the normative frames supplied by newly privileged discourses, but also reinterpreting and reshaping them through their contingent agency as senior professionals. Consequently, the existence of plural discourses, especially where the relationship between them is changing, is potentially generative of political contestation, a point that Friedland and Alford emphasise:

"Some of the most important struggles between groups, organisations, and classes are over the appropriate relationships between institutions, and by which institutional logic different activities should be regulated and to which categories of person they apply. (1991:256)"

Indicative in use of the word “struggle”, shifting roles (and expectations) for actors engaged in hybridity can (and do) trigger tensions and dilemmas in constructing and conciliating multiple identities (Sveningsson and Alvesson, 2003; Hallier and Forbes, 2005). This contestation results from the way in which plural discourses structure the rules of the game; as Kraatz and Block observe, ‘an organisation confronting institutional pluralism plays in two or more games at the same time’ (2008:243). Since these rules provide identities for actors (through the discourses by which they are constructed as subjects), the intrusion of a new logic can have disruptive effects (Sanders and McClellan, 2014).

These disruptive effects are evident in a range of studies concerning hybridity at the level of the individual. For example, and in keeping with health care as the leading site for the study of professional hybridity, Reay and Hinings (2009) report on the restructuring of the Alberta health care system (Canada). Here, the provincial government’s attempt to introduce managerial logics to replace the previously dominant logic of medical professionalism was contested and obstructed by clinicians because it reframed their identity from autonomous professional to managerial agent. In a similar study by Waring and Currie (2009), British medical experts navigated tensions in their context by strategically turning plurality into something usable for their own professional project. Seeing the issues through ‘two way windows’ (Llewellyn, 2001:593), for these subjects the threat of de-professionalisation was supplanted through adoption of managerial identities in a way that enhanced the professionals’ status. In other work, Denis *et al.* (2001) explore organisational change in Canadian hospitals amidst competing managerial and professional logics. Their study found power to be bounded between three alternative elites: the governance structure, senior managers, and senior medical staff. Tensions among these groups encouraged hybrid behaviours; the medical professionals adapting their identities such that they were able to deploy an appearance of compliance with managerial logics while retaining their clinical autonomy.

As noted above, however, while extant literature acknowledges that plural institutional are the antecedent of hybrid subjects, it is less strong in its analysis of the *ways* in which professionals navigate the potential identity conflicts associated with such instability, and *how* they adapt their professional identity accordingly. With hybrid accommodations offering countervailing forces against the pressures of (new) discourses acting on forms of (traditional) professionalism, both process and outcomes deserve much greater attention.

In the most recent research, the aforementioned special edition of *Public Administration* particularly, there is evidence that such attention is now being given. Croft *et al.* (2015), for instance, employ the concept of liminal space; liminality referring to the temporary state associated with identity transitions triggered by the move into a different job role. Individuals who occupy a liminal space are conceptualised as falling into the ‘gaps’ between social groups rather than being perceived as members of the group. This space is not entirely governed by the laws of any one set of discourses, and thus, it is here that the hybrid subject is constructed. While, as has been established, an individual cannot conjure new discourses they can operate at the fringes of multiple discourses, in essence in the ‘spaces between’ established and yet-to-be established modes of professionalism.

The concept of liminality, and the relations of power it implies, also resonates with the notion of “cross-cutting” (Spyridonidis *et al.*, 2015:396). In arriving at this concept, Spyridonidis *et al.* observed that the professionals in their study (focused on health care, again) continued to identify themselves as physicians regardless of occupational demands. Theorising from this observation, their conclusions suggest that no matter what organisation the individual works for, or the work role he or she is tasked with, identification with the profession remains highly salient. Others have found similarly, Pratt, Rockmann and Kaufmann (2006), for example, suggest that, despite a continuing commitment to their professional ideology, doctors will adapt their

identities to accommodate managerial demands of the role. In doing so, there is the potential for medical manager-hybrids to construct themselves not marginally but as a legitimate and professional cadre in their own right, cementing their influence as a managerial elite across multiple organisational contexts (Llewellyn, 2001; Noordegraaf and Van Der Meulen, 2008). For Kippist and Fitzgerald (2009), although their (health care) subjects perceived themselves as clinicians first and managers second, they were also successful in occupying an influential (i.e. non marginal) role in the structure of the organisation. Given the relative status of school Heads and medical doctors, testing whether Heads construct themselves likewise, and whether similar salience is found in educational identifications, is a useful empirical extension of this literature. Alongside these subjectively important identity associations, the literature also highlights the possibility for other nested identities, each attached, with varying degrees of salience, to the differentiated roles an individual enacts at work. Combining the concepts of cross-cutting and salience, Spyridonidis *et al.* (2015) show how hybrids retain (and even affirm) professional legitimacy. So long as association can be maintained with the salient identity across which others cut, the professional can make sense of, and perform, alternatives. What appears to matter in determining salience is perception of purpose and perception of professional worth. If taking on new identities, particularly as a 'manager', is seen to threaten association with the profession it is more likely to be resisted or adopted only through occupational need. If, however, management tasks and managerial identification can be reconciled with professional purpose, or if indeed professionalism can be enhanced, then a more stable base for hybrid association is established. Importantly, for Spyridonidis *at al.* this reconciliation appears to be more readily undertaken by senior professionals; in their study, longer-standing physicians had cross-cutting identities that were dominant and stable and it was this stability which allowed them to assimilate nested identities and take on a managerial role. Again, examining whether the same is true for school Heads is a potentially interesting extension of this finding across contexts.

Importantly, in each of these various studies, hybrids are usually endowed with a great deal of agency; the explanation being that holding expertise, competence, and experience of several fields, and in being considered legitimate by a broad range of people, hybrids are able to reproduce and/or transform institutions. As Currie, Lockett, Finn, Martin and Waring note:

“Powerful actors (re)generate or (re)create institutional arrangements in the face of external threats, in a way that can enhance, not merely maintain, their position. In essence, elite actors are engaging less in ‘change resistance’, and more in positive action through institutional work to shape the change trajectory to ensure continued professional dominance.”

(2012:957)

What the literature highlights, therefore, is the centrality of identity work; here related to the professional dominance, status, protection and validation an individual receives from the profession. It is about enhancement, not merely maintenance, of the professional position. Correspondingly, of each of the four perspectives on hybridity offered by Denis *et al.* (above), identity work is perhaps the most important. Arguably, as the narrative of this literature review has established, each of the others – governance, institutionalism and sociality – feeds off and is fed by identity work.

3.5.6 Hybridity: A Critique

All of the above considered, viewed critically, it would be remiss not to highlight that hybridity is a risky notion. As a theoretical category, the varied and sometimes contradictory nature of its

use points to the dangers of employing hybridity as a universal consequence of, and solution to, plural institutional dynamics.

Central to these epistemological tangles is use of the word 'plural'. With theories of hybridity, of whatever form, set within *plural* external influences, also of varied form, there is a risk of confusion. Is the organisation plural and/or the individual? What then of hybridity, and why the necessity of the term? I suggest that the convention in the literature, albeit implicitly, is to use 'plural' to represent influence and cause (factors 'external' to the entity being studied). 'Hybridity', in contrast, is used to represent the entity itself (the influences of plural external dynamics on the individual, the organisation or the culture). Notwithstanding the intersectional and mutually constitutive nature of plurality and hybridity (plurality begets hybridity which, in turn, begets greater plurality), it is this convention that is adopted here – plurality is used to refer to the external *influences on* schools and Heads, and hybridity the *responses of* the school and the Head her or his self.

Further, the literature review suggests that, for it to have value, hybridity needs to be situated within a specific context where the conditions that shape it can be addressed. Little can be learnt if every organisation and every professional is declared a hybrid. Be it education, health care or any other field affected by plural dynamics, hybridity is highly contingent. The educational hybrid is not the same as the health care hybrid. How can they be? The discourses which construct professionalism are unique to each case. Hybridity is useful then, but only in so much as it points to why and how actors in *specific* contexts might accommodate plural (occupational and ontological) demands. However, applied to particular contexts, in this study the professional identity work of international school Heads, the identity perspective opens up new ways to understand the consequences of plural macro- and meso-level changes to professionalism for individuals and groups, including their perceptions, adaption, or resistance to hybrid roles and

demands. Equally, its situated nature does not necessarily preclude transferability of the concept to other *similar* contexts – as considered later in this thesis, the types of hybridity found in international schools may apply, to varying degrees, to other educational and other non-educational contexts.

To affirm its theoretical value, hybridity needs then to be adopted cautiously and accurately. As it is currently used, hybridity can refer, variously, to an organisation's hybridity, to an individual's hybridity, to the hybridity of an entire culture, and to much else besides. To establish which form of hybridity is being referred to, and thus which theoretical domain is being drawn on, it is incumbent on scholars to establish terms of reference, perhaps compounding, through use of a hyphen, domain and term: professional-hybrid, organisational-hybridity, cultural-hybridisation etc³⁴. Used as such, hybridity opens up avenues to consider relationships of power and to critique attempts by, in the case of this study, professionals to capture power, to assert their authority and, ultimately, to affirm their own (vulnerable) subjectivities amidst multiple, fluid and contingent governance affects.

As a practical strategy for the professional subject, hybridity is equally precarious. Individuals occupying hybrid positions can experience identity conflict arising from fragile identity constructions, and negative emotional experiences when transitioning towards managerially defined leader identities (Sveningsson and Alvesson, 2003; Harding, Lee and For, 2014). That is, the practical realisations of hybridity are not neutral, its meanings not shared, universal or necessarily efficient. Acknowledging these empirical issues, Denis *et al.* (2001) perceive the implications of hybridity as a complex and dialectical process between opposing discourses.

³⁴ Acknowledging that such use may, over extended pieces of text, become clumsy and overbearing, it may be sufficient that the writer, as has been done here, firmly establishes terms of reference at the outset, using hyphenated versions of hybridity on first use and on occasions where clarity benefits.

Within these terms the act of hybridity (and field-wide talk, acceptance and legitimisation of hybridity) is itself constitutive of the subject. Within professional-hybridity, these constitutive processes of becoming, including professional performance, professional standards and the regulation of particular occupational or sectoral skills (Noordegraaf, 2007; Thompson and Smith, 2009), are at the heart of individual's commitments to enduring and appealing but, ultimately, *contested* and *unstable* forms of hybrid identifications.

Indeed, of concern for the individual hybrid, previous literature dealing with plural organisational environments has seen hybrid identifications as a source of tension and attempts to overcome, resolve or deny the insecurity of holding multiple positions as illusory. Knights and Willmott (1999), for example, contend that individuals typically seek to resist or rectify ambiguity through attempts to secure a *stable* identity either as separate subjects (domination or indifference) or as dependent objects (subordination) – a view that implicitly cautions against the pursuit of ontological security through hybridity as inherently contradictory and likely to produce unintended and counterproductive consequences. However, as the more recent literature reviewed above reveals, contemporary thinking suggests that hybridity can be ontologically validating. Hybrid subjects are able to capture network authority and enjoy enhanced professional autonomy; their identities may be less *stable* but that does not mean they are less *strong*.

The point Knights and Willmott (1999) make is not, however, moot. At the time of writing, literature on the conditions under which subjects successfully adopt hybrid roles is sparse (and applied to education, virtually non-existent). The unintended consequences Knights and Willmott warn of are, therefore, a distinct possibility. Indeed, relatively little is known about the antecedents of developing hybrid identities, how these later affect the enactment of hybrid identity work and, in turn, what this does for notions of professionalism and for an individual's

sense of self. In adopting multiple subject positions (in being a hybrid) the opportunities for an individual may be multiplied but, if that positioning is not successful, so too are the consequences – professionally and personally. Consideration of whether, and if so how, situated hybrids do indeed experience such marginality would, therefore, add an empirically useful slant to theories of hybridity.

3.5.7 Doing Hybrid Identities

Though writing long before the current preoccupations with and the necessities of NPM, Hoyle's formulation of two models of teacher professionalism – *restricted* and *extended* (Hoyle, 1975:318) – provides a view of how hybridity might get 'done' in education. The characteristics Hoyle used to illustrate these two positions represent a continuum with: at one end, the restricted professional, essentially reliant upon experience and intuition, guided by a narrow classroom-based perspective and the day-to-day practicalities of teaching; and, at the other end, the extended professional reflecting a much wider vision of what education involves.

Writing more recently (in relation to health care professionals), though not far removed from Hoyle, McGivern *et al.* (2015:1) highlight two broad types of hybrid: 'incidental' and 'willing'. 'Incidental hybrids' are temporary hybrids who protect traditional professionalism, while 'willing hybrids' develop more permanent and enduring professional-managerial identities.

Regarding incidental hybrids, according to McGivern *et al.*, these subjects are not embedded in several institutional discourses (aligning themselves more closely with the dominant/traditional professional discourse) but act strategically in relation to alternate discourses as pragmatic need or regulatory dictat requires. They use 'habitual interpretive agency' (Emirbayer and Mische, 1998 in McGivern *et al.*, 2015:14) to 'represent and protect' professionalism, they influence

colleagues to maintain traditional professional norms, and they use terms like marketisation to 'repair and conceal' (Lawrence and Suddaby, 2006:248) perceived misalignments between professionalism and its managerial context. In contrast, willing hybrids proactively claim, mobilise and agentially use hybrid roles. Despite accusations from colleagues of 'going over to the dark side' or becoming 'poacher turned gamekeeper' for McGivern *et al.* (2015:11) the willing hybrids had developed permanent hybrid identities that revealed plural attitudes towards professionalism. These individuals were able to use 'practical/evaluative' and 'projective interpretive orientations' (Emirbayer and Mische, 1998:971) to reproduce and/or transform institutions.

Extending their descriptions of the types of hybridity observed, McGivern *et al.* (*op. cit.*) suggest five hybrid role-claiming narratives:

- passive professional obligation;
- reactive professional obligation;
- professional representatives;
- formative hybridity;
- and mid-career opportunity hybridity.

In the first of these types, professionals had been volunteered for hybrid roles and felt obligated to do a 'turn'; here identity work resists managerial influences, hybridity occurring only as occupational obligation. The second position suggests hybrids felt obligated to take hybrid roles in reaction to departmental or managerial problems; these hybrids described role conflict but acknowledged the need to engage with management to maintain professionalism. The third hybrid positions themselves as a protector of professionalism, downplaying how the managerial component of hybrid roles affects professionalism. Formative hybridity was seen where professionals described earlier role models or experiences that had formed their professional

identities in a plural sense – the young practitioner guided by a senior professional to see managerialism not as a threat but as a potential career opportunity. The final position suggests that hybrid roles were an unexpected mid-career opportunity, professionals for whom the move into management was a natural career step resulting in identity work less oriented towards professional identity and more so to the potentials of management identities.

Notably, despite the assertion of McGivern *et al.* of both ‘incidental’ and ‘willing’ types of hybridity (2015:1), each of the narratives they describe, with the possible exception of *formative hybridity*, is relatively passive. Hybridity is something that has happened *to* the professional, not something the professional did *to/for* themselves. Even *mid-career opportunity* hybridity, at least as McGivern and colleagues frame it, seems to suggest that hybridity was not pre-planned, considered or thought through; the professionals concerned may now hold onto that hybridity as part of their individual identity (and they may now protect and enhance that hybridity) but it seems that they became hybrids, if not unwillingly, then perhaps unexpectedly. True as these findings may be in the case of the McGivern *et al.* study, this observation suggests the potential for a consideration of whether, in other contexts, hybridity is embraced more readily and whether there are factors (the early career study of an MBA perhaps) that may be markers for professionals constructing themselves as hybrids *by design*.

In their examination of how professionals ‘do’ hybridity McGivern *et al.* (2015) turn, in part, to Lawrence and Suddaby’s (2006) taxonomy of institutional work³⁵. The taxonomy, reproduced below, examines the role of institutional work in creating, maintaining and disrupting organisations and is linked, albeit largely obliquely, to identity work.

³⁵ The concept of institutional work describes ‘the purposive action of individuals and organisations aimed at creating, maintaining and disrupting institutions’ (Lawrence and Suddaby, 2006:215).

Table 6: Forms of Institutional Work (Lawrence and Suddaby, 2006:221, 228, 235)

CREATING INSTITUTIONS	
Advocacy	The mobilisation of political and regulatory support through direct and deliberate techniques of social suasion.
Defining	The construction of rule systems that confer status or identity, define boundaries of membership or create status hierarchies within a field.
Vesting	The creation of rule structures that confer property rights.
Constructing identities	Defining the relationship between an actor and the field in which that actor operates
Changing normative associations	Re-making the connections between sets of practices and the moral and cultural foundations for those practices
Constructing normative networks	Constructing of inter-organisational connections through which practices become normatively sanctioned and which form the relevant peer group with respect to compliance, monitoring and evaluation
Mimicry	Associating new practices with existing sets of taken-for-granted practices, technologies and rules in order to ease adoption
Theorizing	The development and specification of abstract categories and the elaboration of chains of cause and effect
Educating	The educating of actors in skills and knowledge necessary to support the new institution
MAINTAINING INSTITUTIONS	
Enabling work	The creation of rules that facilitate, supplement and support institutions, such as the creation of authorising agents or diverting resources
Policing	Ensuring compliance through enforcement, auditing and monitoring
Deterring	Establishing coercive barriers to institutional change
Valorizing and demonizing	Providing for public consumption positive and negative examples that illustrates the normative foundations of an institution
Mythologizing	Preserving the normative underpinnings of an institution by creating and sustaining myths regarding its history
Embedding and routinizing	Actively infusing the normative foundations of an institution into the participants' day to day routines
DISRUPTING INSTITUTIONS	
Disconnecting sanctions	Working through state apparatus to disconnect rewards and sanctions from some set of practices, technologies or rules
Disassociating moral foundations	Disassociating the practice, rule or technology from its moral foundation as appropriate within a specific cultural context
Undermining assumptions and beliefs	Decreasing the perceived risks of innovation and differentiation by undermining core assumptions and beliefs

For both Lawrence and Suddaby (2006) and McGivern *et al.* (2015), the linkage between institutional work and identity work exists through the observation that ‘identities describe the relationship between an actor and the field in which that actor operates’ (Lawrence and Suddaby, 2006:223). An individual who, for example, believes management tasks to be a *professional obligation* will distance their identities from those tasks, using ‘habitual interpretive agency’ (*loc. cit.*) to represent and protect professionalism. I argue though, that whilst valid, this observation does not go far enough; that is, there is the potential within Lawrence and Suddaby’s taxonomy to examine a greater range of manifestations of identity work in professional settings and, in turn, to categorise more fully/richly how and why individuals ‘do’ hybridity. As such, I maintain that Lawrence and Suddaby’s taxonomy represents an, as yet, underused heuristic that might be usefully applied to reveal types of identity (and institutional) work across a range of contexts, most pertinently the empirical context of this study.

In applying Lawrence and Suddaby’s (2006) work to hybridity, a crucial assumption and argument is that the forms of institutional work described in their taxonomy are not mutually exclusive. Perhaps mindful of this, in their 2009 text *Institutional Work*, Lawrence and Suddaby (in this case with Bernard Leca) present a chapter by Hargrave and Van de Ven examining how institutional actors deal with complexity. This chapter outlines three approaches to institutional work: *either/or*, *moderation* and *both/and*. While they do not make direct reference to hybridity, the theoretical basis of these approaches is strongly resonant with later descriptions of hybridity by the writers aforementioned. The *either/or* approach sees actors separating different poles of contradiction through denial, separation or deliberate ignoring (they may undertake occupational practice at both poles but they identify with *either/or*). The *moderation* approach suggests actors view the poles as opposed but are willing/able to make conditional trade-offs between the poles (in terms of practice and identification). The *both/and* approach sees actors actively using both poles, framing them as complementary. The *both/and* approach, therefore,

best represents ontological hybridity: an individual need not choose to identify between management *or* education, they can, through varying forms and degrees of institutional work, identify with both. A Head may, for example, *police* certain aspects of education (such as the student first narrative), and so sustain 'traditional' professionalism, and at the same time *valorise* aspects of management through those acts of policing (use of student surveys to performance manage teachers, for instance). Both positions are enactments of plural institutional work and acts of hybrid identity work – the Head is *both* an educationalist *and* a manager.

The most salient point here is that an important benefit of hybridity (and thus an important empirical theme of this study) is the ability to use the tension between contradictory elements as a source of power. As Dent and Whitehead (2002) indicate, the contemporary professional must be prepared to: constantly associate themselves with shifting knowledge; immerse themselves in competitive and instrumental cultures; accept the inherent contingency of organisational identification; suspend some sense of reality or, more likely (and resonant of Collinson's dramaturgy), at least give the appearance of believing in continuous pseudo-objective audit and accountability. Unlike *either/or* approaches, where legitimacy motivates compliance with a dominant discourse, in contrast, as Yu notes, 'institutionalising new organisational templates in pluralistic environments necessitates *political* action' (2013:105 *emphasis added*) – it requires *both/and* approaches. This is not to say that legitimacy is unimportant (nor that an *either/or* approach precludes hybridity at the level of practice), rather that under a *both/and* approach, hybridity becomes a resource in the power struggle between actors who identify differently with different discourses, and so enables new/distinctive forms of intervention in the politics of professional legitimacy (Stryker, 2000; Suddaby and Greenwood, 2005).

Individual development/expression as a professional, undertaken through various forms of identity work, occurs then as a professional adopts different forms of institutional work,

recognising some degree of enhancement to their professionalism as a result. As has been argued, these identity transitions need not be universal; hybrids are no more homogenous than other groups of individuals, and the multifarious form/s of socialisation undertaken as a professional are 'important antecedents to identity transition towards hybrid manager roles' (Currie and Croft, 2015:6). Where one individual perceives enhancement and legitimacy as a result of hybridity, another may perceive only a slight degree of it, while yet another may perceive nothing but deterioration. It is in these differences where degrees of, and differences in, hybridity are to be found, with different individuals becoming hybrids by different means and in different ways. For some hybridity is simply a deployable presentation, a pragmatic occupational response to plurality, for others it is an ontological position of enhancement. For both though, hybridity helps the manager-subject address uncertainty and ambiguity. The hybrid can take on blended subject positions without the risk of professional abandonment; vulnerable to societal gaze, hybridity allows professionals to legitimately perform new versions of professionalism without forsaking the benefits of more 'traditional' forms. The relations of power to be found within hybridity are the means by which discourses construct the professional field, making particular forms of institutional and identity work possible and meaningful ways of gathering and exercising power.

Significantly then, finding space for further contribution amidst the developing literature, I assert that theories describing how hybrids draw on/are governed by alternate discourses as part of their identity work, and consequently how professional identity is affected, remains an important area of research with scope for further contribution – especially so in education. The data analysis which follows explores this notion.

3.6 SUMMARY

This literature review has considered, in turn, managerialism, different conceptions of identity, how discourse is implicated in professionalism and, finally, the potential established by those various theories for hybridity. It has also considered a variety of theoretical positions and prior empirical findings that suggest space for continuing inquiry into the way senior professionals experience and engage with pressures to become managerial, and a framework for thought about those experiences and engagements.

Drawing on literature predominantly dealing with state-owned education, the chapter has found that managerialism is prevalent in these institutions. The terrain of public sector Headship is, Ball (2006) argues, being reshaped, reformed and realigned around newly emerging, or at least newly privileged discourses – discourses that determine, for better or for worse, what it means ‘to be a Head’. Importantly, while these findings are drawn from policy changes in UK, US and Australian state-contexts, it is argued here that although the *antecedents* of managerialism may be different, the *processes* by which managerialism is taken on (through practices and by selves) may operate similarly, and its outcomes may be applicable – or at least observable – within international school contexts. Moreover, in contrast to much of the Western-leaning research where school leadership is seen to be *subjected* to a focus on managerialism *at the expense of* education and professionalism (Gewirtz *et al.*, 1995; Bush, 1999; and Ball, 2003 for example), this literature review, in its drawing from multiple domains, suggests that it is possible for Heads to adopt and adapt to plural discourses – for them to successfully enact identities as hybrid educational-managers.

In establishing the theoretical basis for this conclusion, the chapter has suggested that it is productive to conceive of identity as something which is *worked at* by individuals seeking a sense of continuity, stability and purpose amongst an otherwise fragile and contingent existence. Individuals can be defined 'by a set of nested identities rather than by a single hegemonic one' (Bottery, 2004:143; *emphasis added*). Heads do not have to be one thing or the other; they can be many things at once. It follows, then, that such identity work presents both potential constraints and potential opportunities. The necessity to adopt and adapt to plural discourses – not least of those of education *and* managerialism - may be challenging and potentially threatening but, equally, those positions are available for subjective appropriation; the reward for skilled (and pluralistic) adoption being enhanced self-esteem and legitimacy.

From this perspective, rather than being in opposition to educational discourse, managerialism may be complementary. As what it means to be a Head evolves, opportunities may emerge for school leaders to take up and maximise positions of power, authority and control through seductive self-actualising *hybridic* alignment to educational *and* managerial discourse. Thus, while not denying the negative consequences of managerialism, the increase in the power and authority of managers can also be seen in positive terms. Managerialism, although regulatory and disciplinary, may also describe a set of languages and practices on which Heads can draw to capture and resist power. As disciplinary influences, educational and managerial discourses might be experienced by some Heads as opposing and by others as entirely in harmony. An individual need not adhere slavishly or consistently to one set of ideas or another; their identities may be a blend of many ideas and many interpretations of professionalism.

This non-deterministic epistemology provides the theoretical space for strategic identity work by individuals; allowing an understanding of how hybrids find legitimacy in the dualism between subjugation and agency and between interdiscursive subject positions. It hints at how Heads

might find the ability to maintain a sense of professional identity and legitimacy not only in response to the demands of a dominant discourse, but, as hybrids, also through reflexive processes that provide a sense of security in the company of multiple discursive communities with which they professionally identify. Faced with plural professional demands, the Head who can perform a 'student-first' narrative whilst also undertaking performative demands qualifies (literally and ontologically) as an excellent professional.

Correspondingly, as this literature review highlights, a research challenge is how to reveal whether the outcome of these tensions for international school Heads is indeed hybridity. How to discover which discourses bear down most forcefully, and how to address the implications for professional identity? Are international school Heads simply cultural dupes bound by the iron cage of neoliberal discourses, forced to reluctantly take on managerialism by occupational necessity? Or, as this literature review suggests, does managerialism offer a range of seductive and, for the manager, equally affirming identifications? Quoting Lawrence, Suddaby and Leca:

"Maybe [leaders] come to terms with their context, make existential choices, and offer up 'irreversible commitments' that enable and empower them even as a bind and constrain...Maybe they become self-governing subjects rather than socially controlled objects, and integrated wholes rather than fragmented nonentities. Perhaps it is also the case that these positive personal transformations, being essentially sociological in character, can spill over and wash through networks of relationships thus possibly affecting entire organisations...Or, maybe this is just a mirage"

(Lawrence, Suddaby and Leca, 2009:81-82).

With regulation bracketed out of the analysis (Chapter 2) and with the literatures above in mind, the research component of this thesis seeks to answer these questions. Specifically, consideration is given to the identity work of a manager class (Heads) professionalised by one set of discourses (education) but also experiencing the governance potentials of other discourses (specifically, managerialism). That analysis also seeks to address gaps found in current theorising re hybridity, and to establish grounds for new, altered and expanded ways of thinking about how manager-professionals navigate contingent plurality.

CHAPTER 4 – METHODOLOGY

This chapter discusses and justifies the research design and methods chosen for this thesis. Having proposed in Chapter 2 a lack of any serious need for many international schools to compete for business (resultant of continuing increases in demand) and focusing, therefore, on links between professional practice and identity, the literatures reviewed in Chapter 3 situate this work within interpretative traditions (see, for example: Alvesson and Kärreman, 2000; Heracleous and Hendry, 2000). Positioning within these extant literatures also justifies a survey-based approach which, gathering data about the way in which the role and experience of international school Heads are constructed, explores a ‘history of the present’ (Foucault, 1977:31). Central to these methodological choices is also a commitment to discourse analysis that follows the epistemological framework of the preceding sections.

In terms of method, this chapter outlines a mixed-methods approach, which utilises both qualitative and (to a lesser extent) quantitative techniques. Underpinned by consideration of ethics and validity, the chapter details the specifics of:

- an online questionnaire (150 respondents);
- a recruitment documentation analysis (100 job descriptions/advertisements);
- supporting interviews with recruitment consultants (3);
- and interviews with (25) international school Heads.

The last of these methods, the face-to-face interviews with Heads, is the most significant, the richest source of data. The other methods were chosen i) to address the extent to which external pressures might be compelling Heads to act managerially and to see themselves as managers and ii) to inform lines of questioning within the interviews themselves. That is, a mixed-methods approach was adopted because observing exogenous managerialism (through recruitment

documentation) or simply counting the adoption of managerial practices in schools (through an online questionnaire), whilst relevant and useful in informing qualitative understandings, fails to account for the importance of identity work in organisational settings. The methods used sought to bring together a range of data in order to consider whether managerialism (if found) is adopted reluctantly or required of Heads by functional/occupational necessity, or, whether managerialism is also embraced more willingly in forms of identity work; forms through which the manager draws power and an alternate (and perhaps complementary) sense of identification. Equally, is there a middle ground? Are there spaces between these extremes where is found a professional subject bound with, created by, and empowered by hybrid subject positions?

4.1 METHODOLOGY

The epistemological position of this thesis is interpretative. This stance sees behaviour and its effects as complex and uncertain, irreducible to quantifiable calculation. Epistemologically relativist, knowledge here is understood as subjective and understanding only possible through an investigation of how people see, think, and feel about the world. The result of this position is a constructivist ontology which stresses the constitutive and contingent role of sociality in generating not just our experience of the world, but the world of experience itself (Hammersley, 2012). From this perspective:

“Realities exist in the form of multiple mental constructions, socially and experientially based, local and specific, dependent for their form and content on the persons who hold them” (Guba, 1990:27).

An interpretative position holds that there are no transcendental grounds for truth outside the text - no truth exists 'outside of the persons who create and hold them' (Guba and Lincoln, 1989:143). Denzin and Lincoln (2000), for instance, note that interpretative thinking argues that data, rather than pre-existing, is *created* by the researcher through interaction with research subjects. The interpretative position is, therefore, one where knowledge is only ever mediated and subjective, and understanding always fluid and relativistic – 'in the relation of knowing by acquaintance, the experiential knower shapes perceptually what is there' (Heron, 1996:3). That is, as neatly summed up by Nietzsche:

"Facts is precisely what there is not, only interpretations"

(Nietzsche, 1901:481).

Such research aims to reveal the role of language as it relates to ideology, power and socio-cultural change (Fairclough, 1992, 1995). Methodologically, the consequences for organisational scholars of this perspective are that, seen in such terms, organisational discourse is inseparable from an analysis of power relations. In this study, how do the relations of power between educational and managerial discourses play out, and in what ways do they govern Heads' subjectivities?

Discourse then, and Critical Discourse Analysis (CDA), forms a key part of this study's methodological approach. Coherence in the way data from the three inquiry methods is read is found in discourse analysis and the epistemological framework of the preceding sections³⁶ (the online questionnaire, being the only component to fall outside of this methodological stance).

³⁶ To this will, of course, unavoidably be added my own conceptions of the educational-managerial debate; a position which acknowledges the interpretative dilemma (more on which below) that I cannot remove myself and my (pre)conceptions from the research – however, my intention is to represent as best as possible the discourses as described/revealed by Heads, not as I see them.

As a methodological framework, discourse analysis sees language as constitutive and constructive of reality rather than solely reflective and representative (Gergen, 1999). With specific relevance for this thesis, Rhodes notes that:

“...discourse analysis provides an epistemological foundation and/or a methodological approach for exploring the processes of social construction that underlie institutions and institutionalisation.”

(Rhodes, 2002:04)

In adopting CDA, numerous authors have sought to achieve a greater understanding of how and why, and indeed if, certain organisational meanings are seductive, privileged or taken for granted (Keenoy, Oswick and Grant, 1997; Hardy, 2001). What analysis of discourse seeks to unveil then is why some discourses, rather than others, hold greater saliency and why different individuals take up the same discourses in different ways. For discourse analysts ‘institutionalised way[s] of talking’ (*ibid.*) are seen as researchable phenomena, through which can be uncovered the varying normalising, regulating, classifying and surveillance effects that create, maintain and, importantly, through which individuals *change* or are *changed by* discourse. The focus of such work, this project included, is on what discourse *does* (in this case what it *does* to the professional identity project of Heads) not just what it *means* - an investigation of ‘relations of power, not relations of meaning’ (Foucault, 1980:114). In this regard, discourse analysis sees organisations as dialogical entities where discourses vie with each other for dominance and where organisation, with power at its heart, is seen as the plurivocal and complex project of multiple individual interactions and interpretations. Wodak and Meyer, referencing a number of other works, cite three different means by which power can be distinguished in discourse analysis:

“Power as a result of specific *resources* of individual actors (e.g. French and Raven, 1959); power as a specific attribute of *social exchange* in each interaction (e.g. Blau, 1964; Emerson, 1962, 1975); power as a systemic and constitutive element/characteristic of society (e.g. Foucault, 1975).” (Wodak and Meyer, 2009:9)

Continuing, Wodak claims that CDA is not interested, at least not primarily, in the specifics of power within single-exchange situations (between specific individuals and groups), but rather the manifestation/s of social action (power) as determined by social structure (between individuals and discourse) – in other words, ‘power as a systemic and constitutive element/characteristic of society’ (*ibid.*)³⁷. CDA is therefore an attempt to understand the relations of difference that empower and *disempower* the individual, the investigation of interdiscursivity and the re-contextualisation of competing discourses as they shape social realities – here, the re-contextualisation of managerialism in educational terms and the resultant shifts in the social realities of Heads’ identity projects. It is the latter of these power affects, power as a systemic and constitutive element/characteristic of society (and therefore of an individual’s identity), that is surveyed here.

For the researcher this breadth of focus does, however, present distinct methodological challenges – not least of which the question of which discourse/s to research. Addressing these issues, Wodak suggests four interrelated layers of research focus:

³⁷ It is for this reason that the relations of power between, for example, Heads and governing bodies were not a direct focus of this study. More relevant was the discourses Heads drew on when describing these relationships and, thus, from where they drew professional (social) power.

“the immediate, language or text;

the intertextual and interdiscursive relationship between utterances, texts, genres and discourses;

the extralinguistic social/sociological variables and institutional frames of a specific ‘context of situation’;

the broader socio-political and historical contexts, to which the discursive practices are embedded in and related.” (Wodak, 2009:22)

In other words, Wodak recognises the influence and interrelatedness of the macro, the meso and the micro. In this work, the macro-context is that of neoliberalism and globalisation, the engines of international school growth; the meso-context is the field of international school leadership (the profession of Headship); and the micro-context the immediate, intertextual and interdiscursive language that Heads use to make sense of, resist, shape and form the meso and the macro. These interrelationships are illustrated in Figure 1:

FIGURE 1 – Illustrative View of Macro-, Meso- and Micro-level discursive context/s



As Figure 1 suggests, whilst the macro- context represents the antecedents for international schooling as a form of educational delivery, and the meso- context the demands of professionalism, these domains cannot easily be separated from the micro-level actions of individual professionals (and *vice versa*). A key methodological puzzle is, therefore, how to best reconcile individual (micro) and social (meso and macro) perspectives on language use - as Kecskes (2014) reminds us, human beings are simultaneously social *and* individual beings. This epistemological circle is one not easily squared. Unsurprisingly it is also one of much academic debate (Wodak, 2009). If no individual can speak for the context, each unit of analysis speaking only for their own subjectivities, how is research beyond that of the individual possible?

Of the many methodological approaches used to address this question (see Wodak for a summary) the one adopted here is the Socio-Cognitive Approach (SCA) (van Dijk, 2009)³⁸. SCA attempts to make a 'dialectical synthesis' (Kecskes, 2013:44) of the equally important ways in which structure prevails on interpretive perspectives and the ways in which knowledge and meaning (the very structures themselves) are socially constructed. This position is neatly summed up by Kecskes as the bringing together of 'two seemingly antagonistic lines of research: the 'individualistic' intention-based cognitive-philosophical line and the 'societal' context-based socio-cultural-interactional line' (2014:6). SCA suggests that social actors involved in the (re)production of discourse cognitively use (even if that use is subconscious) their individual experiences and strategies in the formation of contextual rhetoric, in so doing they also rely upon collective frames of perceptions derived from the corpus (that is, the discourses to which they are exposed). The individual reflects on and reacts to these frames, at once subject to them and

³⁸ Significantly, while this study shares van Dijk's justification for the study of the individual it does not fully share his understanding of *cognitive structures* as mediating social and discursive practices (an understanding which contradicts the poststructural view of the subject as a product of 'always already' discourse). Furthermore, this study does not share van Dijk's understanding of power as always oppressive, used by certain interest groups and *imposed* on passive subjects. Power in this study, after Foucault, is seen as *productive* – it may subject but it is through its subjectivities that a self negotiates power.

at the same time empowered by his/her subjectivities. Hence, proponents of an SCA methodology claim, it is through examination of socially shared rhetoric (the aggregated narratives of individual interpretations of the corpus) that links can be made between the meso-level social system and the micro-level of individual identity work; the interpretative analysis of individual's rhetoric helps to reveal the discourses through which they are both governor and governed and justifies the individual as a valid unit of analysis.

Finally, and foreshadowing methodological considerations re the role of the researcher, ethics, validity and reliability, it is pertinent to note that critics problematise any meanings discovered by interpretative research as co-created by the researcher (Denzin and Lincoln, 2000). As part of the discourse the researcher *does* something to that discourse; any conclusions describing (and seeking to describe) organisations not as a set of universal truths, but rather as a 'culturally and historically specific way of thinking about work and society' (Jacques, 1996:vii) – conclusions that, for critics, are inherently more limited than the objective 'truths' of positivist research. More substantively, a further criticism is that with meaning always deferred, relative and forever in process, interpretative methodologies make it impossible to identify and address objective factors – indeed, they deny the existence of such. However, the argument here is that the alternative, a purely positivist methodology, would fail to deconstruct the ways in which language offers an insight into the 'acting agentic organism' (Callero, 2003:120) as he/she navigates, negotiates and reflects on the demands of professionalism, simultaneously changing and being changed by discourse. That is, individual Heads are proposed as a site of study, and an interpretative methodology as valid, because simply counting or observing the incidence of a discourse – managerialism, say – fails to account for the important implications of discourses as they constitute the subject and the important influences of the subject on those same discourses. Only the illustrative and iterative power of interpretative analysis can, and even then only in part, reveal the nuance of human bias, the many faces of truth (Schostak, 2002).

4.1.1 The Role of the Researcher

As described, the production of knowledge in qualitative-interpretive research emerges as a result of participatory, conversational and dialogic processes. These processes, most often centered around interviews, are a particular form of social interaction through which *interpretative* meaning is produced and exchanged (Lincoln and Guba, 1985). Crucially, and consistent with a CDA/SCA approach, the epistemological position here is one where the meaning/s participants give to objects of knowledge do not exist independently of the researcher and outside of the social dynamics of the interview encounter. Meanings are developed as a collaboration between interviewers and interviewees, all of whom are cognitively enabled and simultaneously constrained by the particular discursive resources available in that situation (Atkinson and Silverman, 1997). As active contributors, researchers and participants alike construct and assemble accounts of experiences using discursive resources offered and available in their particular situation/s.

Conceiving of interviews in this way directs effort to the identification of the discursive frameworks present in the interview process that can, for better or worse, colour the conversation. As the researcher, I cannot speak from outside of the discourses because, particularly as an 'insider', I am a subject of the very discourses being researched (Yin, 1993). Hence, attention is directed to the researcher him or herself. The role of the researcher and their relationship to the areas of discussion are vital characteristics of the interpretive interview process. The questions, probes and topics the researcher addresses will relate to specific terms and categories understood by the researcher, and these terms and categories will invoke during the interview association/s with particular discourses and particular views of social reality. The potential exists then, due to researcher bias, that some discourses will be sanctioned and others silenced.

To mitigate against this bias, preventing total immersion in the perspectives of the research and thus seeking objectivity, Burgess (1984) suggests that researchers should stand, to the extent possible, outside of the research. This 'outsider' position is, theoretically at least, achieved through researcher reflexivity: about the findings, about oneself and about the impact of one's self on the research. However, the ability to ever truly stand outside of the research is itself contrary to poststructuralist understandings; for poststructuralists, the researcher can never step outside of the research; they are an integral and essential part of it. To remain truly outside the world of the participants means that the researcher and the project itself are excluded from processes that gather meaning, interpretation and knowledge formulations from the individual's subjective relationship and engagement to objects and symbols from their existence. So, whilst a 'man without history' (Schutz, 1964:34) might be able to critically observe events to gain objective truths, since no man can ever be without history, it would appear that the only way to reconcile the need for the researcher to stand outside, while recognising that they will always be irremovably inside, is to suggest a stance, at best, on the margins of the research enterprise. In order to adopt this stance the researcher must, as noted, be reflexive - recognising his or her relationship to the research, considering and declaring the bearing this relationship may have on its results. By positioning themselves both on the outside, with privileged expert knowledge, *and* on the inside, in order to gain valuable perceptions from the participants, the researcher has the potential to complete a project that will add to conceptions of knowledge, meaning and subjectivity in particular contextual locations.

With particular relevance to my own 'insider' position within the discourse (Yin, 1993), this perspective also problematises reported truth regimes as co-created by the researcher. As part of the discourse, the researcher *does* something to that discourse. Thus, whilst acknowledging that as a multi-interested party (a senior manager working within the field of international schooling and, as a PhD student, a researcher of that field) I can never be 'outside' of the

research, it was essential that I be able to achieve sufficient distance to avoid my interpretation being restricted to my own subjectivity. Vital here, as described, is reflexivity. Only by understanding (to the extent possible) my *self* could I then begin to understand what influences that self may have brought to bear on the research (a task undertaken in Chapter 1). Secondly, being inside the research also makes the depth and breadth of my literature review crucial. Given that my own subjectivity is all that I have, and all that I can ever bring to bear, it is crucial that I have sought to widen the aperture and deepen the focus of that subjective lens. The more one understands alternative theoretical positions, the greater the extent to which one is open to multiple interpretations and, thus, the lower the risk of one's own subjectivities colouring the views of the research. To achieve this academic distance, alongside informing my subjectivity through literature review, a disciplined coding process, informed conversations with colleagues and critique by supervisors have, I affirm, mitigated against insider bias.

4.1.2 Ethics

All research brings ethical decisions, and the British Educational Research Association's *Revised Ethical Guidelines for Educational Research* (2012) have informed the ethical decisions taken during the research for this thesis.

When it comes to ethical considerations, one of the main issues, as mentioned above, is bias. Alongside mitigating (and declaring), to the extent possible, researcher bias, it is also important to consider participant bias – something that raises ethical questions. How much of a research project's purpose should be revealed to participants? At the heart of all ethical research, this project being no exception, is 'informed consent' (Cohen, Manion and Morrison, 2011). In essence, informed consent means ensuring that participants know exactly what is expected of them and what the implications, actual and potential, of participation are. There are obviously many positives to this, including the ethical point of not mistreating or misleading people and of

ensuring they are aware of possible consequences of involvement. Informed consent therefore suggests full disclosure; there should be 'opportunities for participants to ask questions about any aspects of the research' (Cohen *et al.*, 2011:277) and they should be made fully aware of the research purpose, its intended outcomes and the intended usage of the data.

The implications of full disclosure do, however, present the researcher with practical issues. As Cohen *et al.* (2011) point out, informed consent can also mean informed refusal, meaning that people can remove themselves from the research at any time. This can be seen as both positive and negative. When asking people to take part, full disclosure and informed consent is obviously a positive. However, this does mean that potentially valuable subjects may not agree to participation (Somekh and Lewin, 2001) and, moreover, that prior knowledge about the research purpose may bias responses – having framed the topics of the research, there is the possibility that the participant will limit themselves to those topics. Informed consent also has the potential to 'disturb the natural behaviour of participants' (Oliver, 2011:81) to the extent that the richest, most authentic data is concealed (Cohen *et al.*, 2011).

The alternative to informed consent is to withhold some of the information about the research project from participants. One of the positives of doing this is that it can facilitate the participant speaking more freely – they choose their own discursive frames, not those of the research(er). Thus, whilst only the most insensitive (and unethical) of researchers will have no care for their participants, if there is a possibility that by limiting disclosure more interesting data might result, difficult ethical questions are raised about how much should be revealed. For this work, I took the decision that I would disclose the purpose of the research, but only broadly. A list of general topics was provided to participants before each interview (to ensure they were happy to speak to each), but not the specific areas of investigation themselves. This was not an attempt to mislead participants; rather it was an attempt to ensure unbiased, neutral and natural responses.

That said, with 'informed consent' firmly in mind, care was taken to ensure that all the participants understood the process in which they were involved. This included an explanation of how they were chosen, how their participation was to be used and to whom the findings would be reported (see the appendices for copies of the various informed consent documentation).

A similar ethical question is raised with regard to the extent to which a researcher reveals his or her own position on a topic (Hammersley and Traianou, 2012); the extent of any such revelation having potential bearing on the research outcome. It is perfectly possible, for example, that my own personal political and/or ideological views may have been in opposition to those of interview participants. In addressing this dilemma, Mickelson (1994) suggests there is benefit to not (overtly) revealing one's own position on the matter. While avoiding disingenuity, needing to retain good relations with participants and in the interests of revealing natural rather than forced (and reactionary) discourses, this was the stance adopted here. Indeed, positioning myself as neutral increased the possibility that participants would be more open, offering genuine and less-guarded responses.

A further ethical consideration is the extent to which interviewee views are respected but at the same time challenged. Here it is important to remember that all of the research participants are school Heads, with a quarter of the sample holding doctoral qualifications. Challenging conversations are a daily reality for my research participants and, post-interview, many expressed enjoyment at the opportunity to discuss issues pertinent to their role. For example, whilst discussion of market-driven/managerial professional identities sits in opposition to a view of the professional education manager as entirely student-focused, this was a conversation that in all but one interview (an interview that became a useful negative case) participants seemingly enjoyed. The opportunity to talk about changing professionalism was welcomed and, I believe, as a result participants gave apparently honest responses.

4.1.3 Validity and Reliability

Finally, and foreshadowing a shift to the specific methods of research, validity is a highly problematic question in all interpretivist research, but particularly so in discourse-orientated research. That Discourse Analysis is value-bound rather than value-free, influenced by both researcher and researched (Lincoln and Guba, 1985), makes it no less beholden to the need for reliability and validity (or, in qualitative terms, confirmability and credibility) than its quantitative cousins.

In simple terms, validity, as conceptualised by qualitative researchers, is largely concerned with accurate descriptions, inscriptions and recitations. Validity is very much about the researcher's ability to provide close accounts of the subjective experiences under scrutiny. In highlighting how validity in qualitative research might be achieved, Lincoln and Guba (1985) propose a framework that reflects quantitative notions of accuracy.

Firstly, they propose that qualitative data must have *internal validity*; the data must be congruent with what was actually discovered, it must accurately represent and reconstruct participants' views. Secondly, they highlight *transferability* (external validity), the view that researchers provide sufficient information to allow subsequent readers to judge the applicability and degree of similarity of the current study to other cases where the findings might be transferred.

Lincoln and Guba also propose *dependability* (paralleling reliability), which requires the researcher to demonstrate that the findings and processes are logical, traceable and documented; and *confirmability* (paralleling objectivity), which calls the researcher to establish data accuracy and ensure that subsequent interpretations are linked and not merely figments of the researcher's imagination (Lincoln and Guba, 1985). Building on the work of Lincoln and Guba

other researchers offer similar lists: the 'descriptive validity', 'interpretive validity', 'theoretical validity', 'generalisability' and 'evaluative validity' offered by Maxwell (1992:286) and Johnson (1997:289-292), for example. Hence, the first challenge qualitative research must address, this study being no exception, is to move beyond the reporting of anecdote and beyond the promotion of personal agendas (researcher or researched). Without giving way to quantitative counting of particular linguistic utterances (which would require a different epistemological approach to that described above), and rather than just repeating what interviewees *said*, the researcher must be able to present findings in such a way as to reveal how discourses are present, powerful and how they are being translated into particular subjectivities. Here again a mixed methodology becomes important. Through a process of coding (the mechanisms of which are explored below) it is possible to quantify incidences of particular words or rhetoric and to use those incidences as a guide for interpretative/qualitative exploration, without reduction to an entirely quantitative analysis. In this way individual utterances become valid exemplars of a general narrative found in the language of multiple participants; they remain the responses of individuals but, through coding, the responses chosen can be claimed as reliable and confirmable.

Examining further how this approach improves validity, the specific example of generalisability is worthy of discussion. For those on the quantitative side of the epistemological debate, the idiosyncratic and parochial nature of qualitative findings reduces the extent to which 'researchers can make wider claims' (Mason, 1996:93); given the 'limited basis for generalisation' (Yin, 1994:10), research findings cannot, with any degree of validity, be theoretically extrapolated to a wider population. Taking a firm stance of this matter, O'Donoghue goes so far as to state 'no claim can be made for the generalisability of interpretivist studies' (2007:65). However, in opposition, Strauss and Corbin suggest that 'the theorist can claim [generalisability] in the limited sense that if elsewhere approximately similar conditions exist, then approximately similar consequences should occur' (1994:278). This locational focus proffers the notion, not of wider

'generalisability', but of what Lincoln and Guba call 'transferability' (1985:316). While not necessarily generalisable to *all* schools, the findings of this project should be transferable (or at least useful) to all *international* schools.

4.2 METHODS

Given that international schools, by very definition, are located internationally, a key research challenge was identifying an appropriate scope and reaching appropriate sites of study. To address those logistical challenges, as noted, it was decided to use a mixed-methods approach. This section examines each method in turn, setting them against the study's three main research questions.

4.2.1 Mixed Methods

Following on from above, although distinctions between methodological paradigms draw attention to the deeper epistemological and ontological assumptions researchers make, such distinctions reveal little about the less philosophical, but no less important, decisions about *what* gets researched and *how*. Taking a more pragmatic stance, rather than concern itself unduly with epistemological debates, a mixed methods approach privileges problem-solving. Having found popularity over the last 25 years (see Greene, 2008), mixed-method approaches combine alternative methods within a single project; research methods (the plural being significant) are chosen for their ability to address a research question, rather than for any sense of academic, intellectual, or pseudo-scientific superiority (Morgan, 2007).

Proposing a 'false dualism' (Pring, 2007:51) in the quantitative-qualitative dichotomy – the misguided assumption 'that to reject one is to embrace the other' (*ibid*) – a mixed-methods

approach asserts that it is possible to embrace the positivism of quantitative analysis without abandoning the social-constructivist realism of qualitative research. Indeed, in reality it is hard to find examples within the social sciences of research that is entirely qualitative or quantitative; as Gorard and Taylor note:

“...all methods of social science research deal with qualities, even when the observed qualities are counted. Similarly, all methods of analysis use some form of number, such as “tend, most, some, all, none, few” and so on.” (Gorard and Taylor, 2004:6, in Denscombe, 2007:119)

While those at the extremes of the contrasting epistemological positions may debate this blended and pragmatic positioning (interpretivists rejecting, for example, reducibility to quantifiable calculation) mixed methodologists take a more balanced view. Interviews, for instance, whilst ostensibly qualitative in nature can, through the use of coding (see below), ‘be structured and analysed in a quantitative manner’ (Basit and Glover, 2010:8). Questionnaires, at first glance often quantitative in nature, can allow for open ended, in-depth responses. Championed by writers such as Creswell (2006) and Gorard and Taylor (2004) a mixed-methods approach generally favours pragmatism – the belief that ‘treating qualitative and quantitative approaches to research as incompatible opposites is neither helpful nor realistic’ (Denscombe, 2007:108).

A mixed method approach also extends the ‘corpus’ of data through which the complexity and fluidity of context can more fully/richly be captured (Fairclough, 1992:227). No one form of data is privileged over another, rather data is valued for its ability to address research aims. This ability to cherry-pick methods pertinent to the research task offers the researcher a number of

methodological advantages; not least of which is the ability, through combination, to compensate for the strengths and weaknesses of different research methods:

“By combining multiple observers, theories, methods and data sources, (researchers) can hope to overcome the intrinsic bias that comes from single-methods, single observer, and single theory studies.” (Denzin, 1989:307)

In other words, researchers can triangulate findings through the use of different methods to investigate the same subject, improving analysis and validating findings (Oliver-Hoya and Allen, 2006). As in the case of this work, findings from the quantitative questionnaire were used to improve and validate lines of questioning in subsequent qualitative interviews. Moreover, the use of multiple, mixed-methods allowed for a grounded theory approach (see below) through which qualitative studies were refined, and the accuracy/validity and richness of the data iteratively improved. In this research, for example, the qualitative elements of the research were deliberately preceded with a quantitative (online) questionnaire. Primarily this quantitative questionnaire allowed the capture of ‘information-rich cases’ (Merriam, 1998:61), sites of investigation where incidences (or conspicuous absence) of managerial practice suggested interesting research locales. What is more, while much of this questionnaire was quantitatively orientated (ascertaining which, if any, managerial practices were in place) the questionnaire also allowed participants to add additional written responses. Not only did these comments extend the reach of the research beyond the limits of convenient travel, they have, in themselves, proven to be a useful source of additional data – the force of one respondent’s qualitative comments on the binary distinction between for-profit versus not-for-profit school revealing that participant’s take on these particular discursive normalisations, for example.

It is important to note, however, that mixed methodologies are not without their critics. Indeed, there is active debate as to whether mixed-methods represents a distinctive methodology (see Greene, 2008) and whether it is even possible to dialectically tack (Geertz, 1983) or to make epistemological mind shifts (Patton, 2002) between contextual specifics and generalisable observations. In answer to these questions, Greene, as a proponent of a mixed methods approach, suggests that mixed methodologies:

“...offer deep and potentially inspirational and catalytic opportunities to meaningfully engage with the differences that matter in today’s troubled world, seeking not so much convergence and consensus as opportunities for respectful listening and understanding” (Greene, 2008:20)

Given the nature of the research at the heart of this project, Greene’s is a position shared here – and a mix of quantitative and qualitative methodologies adopted. Whereas, in broad terms the epistemological position of this thesis is poststructural and interpretative that position is not held to the exclusion of other useful sources of data. The use of (quantitative) questionnaire data has been used to provide a basis for adjudication between external factors (‘out there’) and other more qualitative explanations (factors that might be ‘in here’).

Although this is relatively new research territory, it is not entirely virgin. Routinely used in education and nursing (Datta, 1994), previous mixed-method studies have sought to use multiple methodologies because the practical demands of context called for both generality and particularity, as well as a presentation of results that conveyed magnitude and dimensionality and, at the same time, portrayed the situatedness of lived experience (Denscombe, 2007). For example, in their review of the ‘kinds of international school leaders in demand around the world’ (2014:91) Roberts and Mancuso use an analysis of recruitment documentation similar to that

undertaken for this study. Their work, while being more positivist in its reporting (detailing the frequency of specific job requirements), takes incidences of language in recruitment documentation (a quantitative measure) as an insight into the '*type of leaders*' (2014:103; *emphasis added*) required and the skills demanded of them (qualitative analysis). Taking a similarly blended epistemological stance, Hill considers educational leadership from the perspective of elusive social interactions where schools are constructs of a reality which is proper to each individual but, equally, he holds that this view is entirely 'complimentary to rational models' of leadership practice (2014:176). Hill argues (using the work of Boyd and Crowson) that schools are cultural artefacts that reflect the values of their membership at the 'interplay between *rational*, instrumental organising forces and *irrational*, expressive, anarchic forces' (Boyd and Crowson, 1981:319; in Hill, 2014:178; *emphasis added*) – a situation suggestive of why mixed-methodologies have found particular traction within education (Datta, 1994). There is, as a result, some precedent for a study of this nature.

In summary, it is maintained that to describe the multiple, fluid and contingent nature of identity work as undertaken by international school Heads, an interpretative-qualitative epistemology has proven most relevant. Importantly, it is also suggested that this approach was enhanced through the pragmatics of a mixed-methods approach. Thus, while positivist data was generated through online questionnaire and recruitment documentation review (the exact nature of this collection described below), the intent was not to use this data in an objective, quantifiable sense; rather this data is used as a springboard to guide interpretative enquiry – to *inform* qualitative investigation and understandings.

For clarity, the purpose of each method adopted, and the subsequent sequence of examination that each supports, is summarised in Table 7:

Table 7: Summary of research design/methods in relation to research questions

RESEARCH QUESTION	METHOD/S	INDICATIVE FOCI	INDICATIVE EVIDENCE
<p>RQI: What forms of managerialism, if any, are emerging within international schools which might exemplify the antecedents of managerial identities?</p>	<p>Part A: Online questionnaire</p> <p>Part B: Recruitment documentation review (and three supporting interviews with recruitment consultants)</p>	<p>To what extent are managerial practices evident in Headship job descriptions/recruitment requirements?</p> <p>To what extent is managerialism found within (current) international school practice?</p>	<p>Incidence of:</p> <p>accountability to performance metrics;</p> <p>dissonance between contracts and tenure (high labour turnover);</p> <p>performance management and use of non-educational targets;</p> <p>credentialism (especially management qualifications)</p> <p>requirements for Heads to understand business models/tools;</p> <p>profit share;</p> <p>performance-related pay.</p>
<p>RQII: Which discourses, educational and/or managerial, seem dominant in the processes of identity formation for international school Heads?</p>	<p>Part A: Online questionnaire</p> <p>Part B: Recruitment documentation review (and three supporting interviews with recruitment consultants)</p>	<p>What discourses do the texts evidence – managerial and/or educational?</p> <p>Do the texts evidence a competing or complimentary plural discursive environment?</p> <p>Do the texts evidence externally imposed/derived changes to professionalism?</p>	<p>Evidence of:</p> <p>‘student first’ discourse;</p> <p>managerial language (“performance”, “sales”, “clients”);</p> <p>linguistic shifts from educational outcomes to efficiency and performance;</p> <p>Reference to the market and/or competition as justification for management action;</p> <p>Co-option/conflation of management requirements and professionalism.</p>
<p>RQIII: What are the outcomes, in terms of their professional identity work, for international school Heads as they reconcile the plural demands of education and managerialism?</p>	<p>Part C: Twenty-five face-to-face interviews with Heads</p>	<p>What discourses (educational and/or managerial) do Heads draw on when describing their professional identity?</p> <p>Do the Heads defer managerialism to other bodies/other selves?</p> <p>Do the texts evidence hybrid identifications?</p>	<p>Heads describe themselves in terms of:</p> <p>identification/s as a teacher and/or to education;</p> <p>identification/s as a manager and/or to managerialism;</p> <p>identification/s in relation to plural demands.</p>

Each research component, parts A, B and C, are now explained and detailed.

4.3 METHOD I - Part A: Online Questionnaire

Based on a review of literature pointing to language and practices considered indicative of managerialism (Chapter 3), an online questionnaire was used to ascertain whether this language and these practices are found in the sampled international schools (Research Questions I and II). This approach rested on the hypothesis that finding frequent incidence of managerial practice would point towards a technical and functional requirement for Heads to adhere to these practices, at least occupationally. In contrast, it was conjectured that finding limited incidence of actual practice or language might point to either a lack of functional need for such practice and/or to the moderating influences of other factors – perhaps to Heads’ strong identification with educational discourse and to the influences of resistant institutional work (and to resistant identity work).

Again, in an effort to represent the international nature of the field, by distributing this questionnaire online (via SurveyMonkey³⁹) it was possible to extend the reach of the study globally. Moreover, casting a wide net ensured that the questionnaire encompassed schools of varying types: for-profit, not-for-profit, corporate, proprietorial, small and large. This variety allowed for comparison between practices common in different types of school and, therefore, for subsequent analysis of whether pressures of ownership or school type influence Heads’ identity work. The final online questionnaire sample, covering 150 respondents, is made up of the following proportions (raw numbers):

³⁹ SurveyMonkey was chosen for its ability to allow for intuitive questionnaire design and for its in-built analysis and graphing tools. Using SurveyMonkey mitigated any chance for researcher error in transcribing results (into a third-party application such as Microsoft Excel, for example). SurveyMonkey also had the best reputation for online security – a feature, mindful of research ethics, that was particularly important.

Private Owned/Proprietorship	42%	(61)
Charitable Trust/Foundation	36%	(53)
Corporate	14%	(22)
Other	8%	(14)
Franchised	4%	(6)
Non-Franchised	89%	(134)
Other/Prefer Not to Say	7%	(10)
Single School	72%	(108)
Part of a group of schools	28%	(42)
For-Profit Schools	58%	(85)
Not-For-Profit Schools	39%	(58)
Other/Prefer Not to Say	3%	(7)

The questionnaire broadly covered:

- School Ownership
- School Governance and Management
- School Leadership
- Strategy, Marketing and Development
- Human Resource Management
- Performance Management
- Budgeting

Under each of these themes, questions were directed to particular managerial practices (the use of performance-related-pay, for example), to the presence or absence of particular business ideologies (profit share, for instance) and to the extent of business influences on school governance. Each question gave appropriate response categories, an 'Other' or 'Prefer Not to Say' option and the chance to provide additional comment. For example:

Figure 2: Example from Online Questionnaire

Which description best fits the school's ownership structure?

Other

Public Limited Company

Privately Owned/Proprietorship

Charitable Trust/Foundation

Prefer Not to Say

Corporate/Group Owned (GEMS, Cognita etc)

Other (Please Specify)

Care was taken when devising the questions to avoid bias, leading questions or assumptions. In order to do this, questions were constructed with the support of my Supervisor and with the guidance of other University staff familiar with international schooling. Further, I also sought the input of a former international school Head (qualified at PhD level) who was also a past Chair of several international school associations, hence being in a position to comment with some expertise on the relevance of the questions (to preserve anonymity this colleague is referred to hereafter as DH). With the help of these various trusted advisors, questions, topics and themes were revised to ensure methodological validity and appropriateness for purpose.

With the questions and design refined, I then piloted the questionnaire with three additional colleagues. Each of these pilot respondents was a Head currently working in an international school, specifically chosen because they gave a different perspective from my own or from those whose input I had previously sought. Where, for example, input to that point had been exclusively individuals with experience of British international schools, here I deliberately sought the input of colleagues with American and International Baccalaureate experience. Each of these trial participants were asked to time completion of the questionnaire and to make comments on any difficulties or issues they had with particular questions. Further adjustments were made in light of this feedback. As these respondents completed a trial version of the questionnaire their results are not included in the final analysis. In its final iteration, the questionnaire included 60 questions, taking 15-20 minutes to complete.

To maximise the number of responses, attempt was made to distribute the questionnaire as widely as possible. SurveyMonkey generates a web link that participants can use to access the questionnaire online. With accompanying explanatory letters (see appendices), this link was sent by e-mail to approximately 1,000 Heads within my own professional networks and, with the assistance of DH in facilitating introductions, via the British Schools of the Middle East (BSME),

the Federation of British Schools in Asia (FOBISIA), the East Asia Regional Council of Schools (EARCOS), the Association of International Schools in Africa, the Association of American and International Schools in South America (AASSA) and the Confederation of British International Schools (COBIS) to their member schools.

The questionnaire was open for completion between January 2014 and June 2014. The questionnaire was not publically viewable, being accessible only via the bespoke web link (i.e. only those to whom the link was sent). This approach allowed me to tightly control the sample, ensuring that the link was only sent to international schools⁴⁰ and, within those schools, to the Head/Principal.

In total, 150 schools responded to the questionnaire, a response rate of 15%. This low response rate was disappointing, though given typical questionnaire returns not unexpected. Taking a total population size of 7,000 international schools at the time of the questionnaires operation (as reported by ISC Research, 2014) with a 95% confidence level and a confidence interval (margin of error) of +/- 5%, the ideal sample size would have been 364. Of those schools approached (approx. 1,000), using the same confidence interval and level, a sample size of 278 (a 28% response rate) would have been statistically sound. Significantly, this suggests that my data is not statistically representative of the overall population. However, the final sample, although small, includes schools covering Europe, South America, Asia, Australasia, Africa and the South Asia. It also covers schools with student rolls ranging from 55 to 5,000 (the average roll within the sample being 749 students). Within this, schools offering British curriculum, American curriculum, Canadian Curriculum, International Baccalaureate and Montessori schools (plus various other hybrid and country-specific curricula) all responded. Despite the proportionately low response

⁴⁰ See Chapter 1 for a discussion of the related complexities with regard to what actually counts as an 'international' school.

rate, I believe that the results represent a sufficiently diverse sample and a sufficient number of responses to be broadly applicable. Moreover, as noted, the purpose of the questionnaire was to inform the qualitative interviews and this, I assert, the sample adequately allowed for. That said, the low level of statistical validity and the limitations this presents in drawing conclusions is reflected and acknowledged in my data analysis.

In constructing the questionnaire, I took the decision not to offer participants a summary of results immediately on completion (a facility SurveyMonkey offers). Instead, participants were offered a summary of results by request, though only after full analysis had been undertaken. This decision was made to ensure the integrity of the data (had the results 'leaked' into international school networks that leak could have biased future responses) and, as importantly, to ensure that early release of results did not reduce the overall response rate. A summary of results, with letter of thanks, was sent to all respondents who requested such.

Finally, participants were asked at the close of the questionnaire if they would be willing to be interviewed face-to-face for Part C of my research. If participants indicated willingness they were then asked to send an e-mail to my Keele University e-mail address indicating such. Asking participants to e-mail helped to maintain confidentiality within SurveyMonkey itself (no personal details were requested in the questionnaire) and helped to affirm the principle of informed consent and double opt-in (participants had to actively e-mail to indicate willingness). A small number of questionnaire participants indicated their willingness to be interviewed. On three occasions these expressions of interest were followed up, selection being by convenience of location and through identification of 'information-rich cases' (Merriam, 1998:61). Indeed, on two occasions the questionnaire results presented such potentially rich sites of investigation (with willing participants) that I flew to Taipei and to Vietnam specifically to undertake interviews.

4.3.1 Online Questionnaire Ethics

In all cases it was made clear to potential questionnaire respondents that participation was entirely voluntary. Anonymity was also fully assured and rigorously maintained at all stages of the process.

The broad (though not specific) purpose and the intended use of the questionnaire was made clear to participants in both the introductory e-mail and on the first page of the questionnaire itself (see appendices). It was also emphasised that respondents could skip questions they did not wish to answer and that a 'Prefer Not to Say' option was provided where relevant. The questionnaire could be exited at any time without penalty or prejudice. No reward, save the option to request a copy of the results, was offered for participation. No individual's name or other means of identifying individuals was requested in the questionnaire. School name was requested (primarily for follow-up of potentially rich sites of qualitative enquiry), though it was made clear that this was not required and could be left blank. In the final results, no school, group of schools, or entity of any form is identifiable. All results are presented in the aggregate; the only exception being the inclusion of fully anonymised comments made by participants in relation to particular questions. The questionnaire results were only accessible by myself, password protected within SurveyMonkey.

In no sense did contact through the various international schools associations represent any compulsion to complete the questionnaire. The distribution of questionnaires through these associations is normal practice and it is understood, indeed made clear in distribution e-mails by Association chairs, that completion is voluntary. This method was used simply because it extended reach beyond my own network of contacts, giving access to a globally located sample.

4.4 METHODS I and III

Where Part A is quantitatively-orientated, Part B (the recruitment documentation review) and Part C (the face-to-face interviews) are aligned with the qualitative methodology and commitment to discourse analysis outlined in section 4.1. As discussed, this approach provides a means to understand the processes by which individuals make sense of the world and themselves in the world – the quantitative data of Part A being used to guide and inform interpretative enquiry. This section discussing the specific methods adopted to support that interpretative approach.

4.4.1 Critical Discourse Analysis

The specific method of interpretative enquiry adopted is Critical Discourse Analysis (CDA). This approach draws attention to ‘how discursive practices constitute both objectivities (social institutions, knowledge) and subjectivities (identities and actions)’ (Cunliffe, 2008:81).

Researchers using CDA - Alvesson and Deetz (2000), Alvesson and Kärreman (2000), Knights and Willmott (1999), Phillips and Hardy (1997), to name but a few - start from the premise that ‘a piece of discourse is embedded within sociocultural practice at a number of levels: in the immediate situation, in the wider institution or organisation, and at a societal level’ (Fairclough, 1995:97). For this reason, CDA regards a wide range of organisational data as valid means for understanding and talking about organisations. Informal conversations, interviews, meetings, briefings, and presentations, and the production and consumption of texts such as emails, minutes, newsletters and operating procedures each collectively shape, inform, and constitute the rules and governance capabilities of (individual) actors within a field.

The key question in terms of method is how one 'gets at' the discourses underlying, informing and shaping these pieces of data. Common CDA methods suggest, for example, that research should be based on free-flowing unstructured interviews, with participants shifting between different narratives naturally and thus potentially revealing important discursive positions (Wodak, 2009). In contrast, however, here it is contended that in order to maintain validity, a semi-structured approach is preferable. Whilst an interpretative approach suggests a formless discussion, the interview must also have some structure – if not, it risks being simply a conversation and not an act of research. The interview process must be conducted within a framework of topics derived through detailed review of literature, relevant experience and the lessons learnt from pilot studies and previous research.

Contextually, this involved guiding (not forcing) the conversation towards areas identified in Chapter 3 as sources of managerial effects: organisational structure and form, management technologies and attitudes towards them, language, rhetoric, and the normalisation of management and managers⁴¹. This backdrop provided a framework that steered participation in interviews. Conversational freedom was allowed but within an established (albeit broad and potentially flexible) frame (Schostak, 2002). In practical terms, this translated as a list of open-ended questions and prompts (see appendix V) used to keep the conversation 'on topic' but, importantly, not used to the exclusion of potential valuable divergences. Thus, as Rapley (2007) suggests, should be the case in this type of research, while the themes remained constant, the questions asked differed from person to person (and the same type of questions were not necessarily asked in each interview⁴²).

⁴¹ To avoid leading participants, the term managerialism was not used in the interviews. The rationale for this is further elucidated in 4.6.3.1.

⁴² The limitations of this approach are examined in Chapter 6.

Although this approach might help to promote and capture a sense of reality, honesty and openness, it relies, however, on the researcher's (in this case my own) 'theoretical sensitivity' (Glaser and Strauss, 1967). That is, it relies on the researcher's (my) ability to direct the conversation such that salient discourses are drawn *out* not directed *in* – allowing the theories that emerge to be grounded in the experiences of the participants and not grounded (solely) in a researcher's own subjectivities and bias. In this light, to mitigate against the potential for researcher-as-director, it was vital that I did not adopt a commanding style, instead, adopting the position of listener and observer, with the accompanying behaviour and manners appropriate to such a collaborative process. This delicate line between freedom and direction is one I believe that my experience, position and approach allowed me to (carefully) tread.

Additionally, interviews that question, even indirectly, subtly and carefully the power base of research participants can be fraught with complexity and danger – not least of which the potential of a participant cutting an otherwise valuable interview short (which, fortunately, did not happen). My interviews therefore had to be able to unravel and account for the complexities inherent in a critique of how Heads engage in institutional work whilst also avoiding outward critique of that work during the interviews. This required, on occasion, a delicate balancing act between agreement, disagreement, enquiry and challenge. Inevitably, some interviewees responded better to this than others. It is notable, however, that where the interviewees offered counter-challenge, the data that emerged was much richer and much more revealing. The following extract is illustrative of both points:

Interviewer: Then clearly, philosophically, you don't have issue
with the for-profit moniker...

Interviewee (C19): No, none whatsoever.

...there are others who have I would say - well sometimes there is a disconnect between international education and independent education...the teachers we recruit often bring a maintained sector view...

Interviewer: I understand; we've experienced similar things. What's the differences though? Do you mention the for-profit status to staff? How do staff react if you use 'corporate' language?

Interviewee (C19): All I would say about that is I would be very careful. I'm much more likely to use that language one-to-one across the sofa as we're talking now than in a public environment. However, in my training opportunities and when I speak to junior staff, senior staff, induct new staff, I'm thinking practically every one of the feedback sessions from my class observations, this would be referred to.

Interviewer: Why do you think you are more comfortable with that language than staff?

In this example can be seen direction (the conversation is moved away from a potential aside re maintained sector teachers), empathy (reference to shared experiences) and challenge (the interviewee is challenged to provide richer and more detailed answers, and to reflect on his own self).

Helping to deconstruct what rhetoric of the kind exemplified above is *doing*, rather than just what it *means*, the specific form of CDA (see Wodak for a summary of alternatives) adopted here is Socio-Cognitive Analysis (SCA). SCA theorists maintain that, textual markers, such as those listed below, are important:

- “stress and intonation
- word order
- lexical style
- coherence
- local semantic moves such as disclaimers
- topic choice
- speech acts
- schematic organisation
- rhetorical figures
- syntactic structures
- propositional structures
- turn-takings
- repairs
- hesitation”

(Wodak, 2009:29)

It is identification and consideration of these kinds of markers which forms the analytical basis, via electronic coding, of the data interrogation undertaken in reference to research components B and C.

4.4.2 Part B: Recruitment Documentation Analysis

This research component involved review of recruitment documentation related to international school Headship positions and three supplementary interviews with recruitment consultants. The intention of this analysis was to explore which managerial practices, if any, are formally required of Heads by virtue of their job descriptions. In particular, the analysis sought to establish whether the extent of managerial practice suggests modes of professionalism infused with 'managerialism' (Research Question 1), thereby signifying identity work as a *reaction* to exogenous requirements. Evidence of performativity (after Lyotard) and of recourse to financial targets in this documentation would, for example, suggest that Headship is being (externally) constructed in particular ways and with particular purpose. Evidence of a strong educational bias in these documents would suggest different governance affects.

A recruitment documentation analysis was chosen because, as well as addressing external influences on Headship, it afforded global reach; that reach being essential to represent the *international* nature of the field being investigated. The electronic accessibility of recruitment documentation for any Headship vacancy at any international school, via websites and recruitment consultants, made this reach possible. The final sample includes 100 job advertisements and job descriptions for Headship positions, covering:

Table 8: Geographic Breakdown of Recruitment Documentation Sample

COUNTRY	TOTAL	COUNTRY	TOTAL	COUNTRY	TOTAL
UAE	21	Guernsey	2	Portugal	1
China	11	India	2	The Bahamas	1
Latin America	8	South Korea	2	Netherlands	1
Hong Kong	5	Japan	2	Austria	1
Malaysia	6	Denmark	2	Malta	1
Indonesia	4	Laos	2	Kenya	1
Switzerland	3	Russia	2	Hungary	1
Thailand	3	Singapore	2	Norway	1
Mexico	3	Belgium	1	Malawi	1
Germany	2	Spain	1	USA	1
Nigeria	2	Bulgaria	1	TOTAL	100
Kuwait	2	Tanzania	1		

These documents were sourced, during the period April 2013 to April 2014, directly from the *Times Educational Supplement* (via www.tesjobs.co.uk) and through four recruitment agencies websites (or by direct request from those agents):

- Anthony Millard Consulting (www.anthonymillard.co.uk) (By Request)
- Teacher International Consultants (www.ticrecruitment.com) (By Request)
- Search Associates (www.searchassociates.com) (Via Website)
- Council of International Schools (www.cois.org) (Via Website)

In total, sixty sets of documentation were sourced via the TES and ten from each of the recruitment agencies listed above. The primary criteria for selection of particular documentation was simply that the recruitment documentation related to an international school Headship vacancy or titular equivalent. Secondary criteria related to the breadth of the sample, hence drawing documentation from five different sources (thereby improving validity).

In seeking breadth, and not wishing to bias the sample, I was deliberately unselective about which specific documents to include. Thus, while in regard the *Times Educational Supplement* selection of job advertisements was random, in practice this translated as selection of most of those that appeared during the period. The only documentation dismissed was that which provided insufficient detail for analysis; where, for example, there was limited data in relation to the type of person required or the nature of the post itself. With regard to the recruitment consultants, I requested or sourced via their websites, ten job advertisements/descriptions from each, indicating no preference other than that the documentation be for international school Head/Principal positions (again the extent of detail in those documents being more important than other selection factors). These particular consultants were chosen because they are, in my experience, amongst the most popular and well-known of those serving the international schools market and because, between them, they cover a wide selection of international school types: premium (Anthony Millard), British (Teacher International Consultants), American/International (Search Associates) and, covering the full range, the Council of International Schools. Across these different sources I was, therefore, able to ensure that a random sample would include diverse school types, locations and contexts.

With regard to ethics, it should be noted that the job descriptions analysed were those published as part of application materials; the job descriptions are not internal documents, rather they are public-facing documents available to potential candidates. In all cases, it was electronic versions (in Word or PDF form) of these various documents that were collected and collated. Taken from these sources all documents were, therefore, in the public domain and thus not subject to confidentiality issues. That said, in order to further assure confidentiality, no school or group of schools is identifiable in the presentation of the data; all analysis is done in the aggregate or, where text from an individual job advertisement or job description is cited, it is done so in anonymised form.

4.4.3 Coding of Recruitment Documentation

Using Nvivo⁴³ these documents were imported and subjected to a process of coding. Initially this coding was simply a read through of each document, an open-coding methodology (Berelson, 1952) intended to identify key phrases, terms or expressions that made ‘inchoate sense’ (Sandelowski, 1995:373). In practice, this process involved examining each document line-by-line in order to interpret how that text was constructed and how different statements might come to represent important narratives (Charmaz, 1990). Here these primary narratives related to three questions I kept in mind as reading the texts:

- What discourses do the texts evidence – managerial and/or educational?
- Do the texts evidence a plural discursive environment?
- Do the texts evidence externally imposed/derived changes to professionalism?

With these questions in mind, each text was considered ‘independently and collectively’ (Basit, 2003:8); with the aim to ‘make sense’ of what I found once I ‘had found it’ (Gillham, 2000:6). Thus, after a first read through, the broad themes were then, via further readings, deconstructed and dimensionalised (Strauss and Cobin, 1990) into specific categories and, after yet further read-throughs, these categories themselves further deconstructed into specific codes; each code representing particular ‘words, phrases or sentences’ that helped to ‘trigger the construction of a conceptual scheme’ (Basit, 2003:4-7). To arrive at this schema a ‘constant comparison approach’ (Glaser and Strauss, 1967:101) was used to seek out texts (and fragments of texts) that were similar or dissimilar. Finally, closing out this iterative process, each document was re-read

⁴³ After a review of various electronic coding software Nvivo was chosen because it offered a version for Mac (that I was able to secure via Keele University Library) that, to my mind, provided the most intuitive interface. Electronic coding was chosen because of the volume of texts I anticipated needing to analyse, because of its flexibility with regard to categorising and re-coding, and because of the availability of powerful analysis tools (word frequency, coding queries, word trees etc).

with codes merged, separated and created as what was initially inchoate began to make more sense (Saldana, 2013).

Underlying this process of category and code selection was constant reference to the literature as laid out in Chapter 3 and, as above, works citing potential sources of evidence for where managerial practice might be found in schools. In practice, my coding method differed from the original Glaser and Strauss (1967) position in which theory emerges from data and data alone. Instead, I drew on both grounded theory and CDA, moving between theory and data 'constantly comparing' (*loc cit.*) the theories presented in my literature review to the practices, policies described and language used in the recruitment texts.

Having a deep awareness of theory and context, while also being able to reflexively mitigate researcher bias during analysis, is essential to the credibility of this approach (Silverman, 2010). While having insider knowledge was invaluable (Yin, 1993), giving (me) the researcher an appreciation of what texts might *actually* be conveying, insider and prior knowledge presents challenges relating to the existence of (my) pre-dispositions or assumptions. In order to move between data and theory without bias required criticality, reflexivity and the useful guidance of trusted colleagues (my supervisor, for example). That my codes, my sense of the data and my position on theory, changed through various iterations of the process is evidence, I argue, that I approached the research with the necessary distance and analytical rigor.

With this process in mind, the final codes arrived at were:

Table 9: Coding Analysis for Job Description and Job Advertisements

THEMES	WHAT DISCOURSES DO THE TEXTS EVIDENCE? DO THE TEXTS EVIDENCE HYBRID JOB/TASK REQUIREMENTS? DO THE TEXTS EVIDENCE EXTERNALLY IMPOSED MANAGERIALISM?						EXPLANATION
	DESCRIPTION OF EXPERIENCE REQUIRED	DESCRIPTION OF QUALIFICATIONS REQUIRED	EDUCATIONAL REQUIREMENTS	MANAGERIAL REQUIREMENTS	PROFESSIONALISM	NETWORK ASSOCIATIONS	
CODES							
SPECIFIC EDUCATIONAL REQUIREMENTS		87	214		41		Evidence of educational elements to role (mentions, for example, of 'leading learning')
FOCUS ON STUDENTS			87		132		Evidence of the role relating directly to students
FOCUS ON STAFF (T&L, WELL BEING)			43		88		Evidence of a focus on staff in regard to teaching, learning or well-being
GENERAL EDUCATIONAL LEADERSHIP REQUIREMENTS			158		35		Reference to non-specific management tasks such as organizing, developing, implementing etc
BUSINESS-COMMERCIAL SKILLS				44			Evidence of specific skills associated with business or commerce (sales, economics etc)
FINANCIAL SKILLS/KNOWLEDGE	36			22			Evidence of specific requirement for financial skills
MARKETING SKILLS/KNOWLEDGE	46			18			Evidence of a requirement to manage and engage with marketing processes
USE OF DATA	29			18			Evidence of the use of data (in relation to managerial practices)
ACCOUNTABILITY (APPRAISAL)	16			8			Evidence of requirement to be held or to hold staff to account
SPECIFIC EDUCATIONAL EXPERIENCE	152						Evidence of the requirement for applicants to have prior educational experience
SPECIFIC MANAGERIAL/COMMERCIAL EXPERIENCE	36						Evidence of the requirement for applicants to have prior educational experience
EDUCATIONAL QUALIFICATIONS		43					Evidence of the requirement for applicants to have specific educational qualifications
MANAGEMENT QUALIFICATIONS		8					Evidence of the requirement for applicants to have prior management qualifications
GENERAL EVIDENCE OF MANAGERIALISM				124			Any further evidence of managerial language
REQUIREMENT TO BELONG TO AN ASSOCIATION						0 (86)	Requirement for candidate to belong to a particular international school association (no direct requirement; but Associations mentioned 86 times)
MANAGER-PROFESSIONALISM					73		Evidence of documentation reflecting managerially-inclined professionalism ('strategic vision', for example)
MANAGERIAL JOB TITLES					43		Evidence of managerial job titles (Director/CEO etc)
MANAGERIAL INFLUENCE ON APPRAISAL					61		Adoption of managerial language in relation to appraisal ('professional growth', for example)

In each column, the number refers to the frequency of a particular code. The total number of codes recorded in this analysis was 1,662. It is important to highlight that, particularly in the case of educationally-orientated language, only strong or notable incidences of language use were recorded. Equally important, these numbers are not included for statistical comparison. Coding totals are included to give a *sense* of the tone of the documents. The high incidence of educational coding helped, for example, to give a sense that these documents draw on the discourses of education, but it was the *ways* in which language was used that was more important to the analysis undertaken in Chapter 5. Such is the nature of this qualitative and interpretative study that a re-coding of the texts would likely produce subtly different results.

Finally, Nvivo was also used to conduct a word frequency analysis of the recruitment documentation. As D'Andrade notes 'perhaps the simplest and most direct indication of schematic organisation in naturalistic discourse is repetition' (D'Andrade, 1991:294). In addition to the careful reading described above, Nvivo was also used to identify word repetitions and associated synonyms that might point to requirements of Headship common across the sample.

A full list of the 50 most frequent terms can be found in Appendix I, included in Chapter 5 are only those most notable for analysis – terms that, in their repetition, suggest significant and field-wide constitutive influences. To supplement this analysis, where relevant, frequency counts were also run on other *ad hoc* words or phrases considered by the literature as particularly suggestive of managerialism or the workings of discourse (reference to these counts is made, as relevant, in Chapter 5).

4.4.4 Interviews with Recruitment Consultants

To augment analysis of the recruitment documentation, face-to-face interviews were undertaken with three international school recruitment consultants. The purpose of these interviews, undertaken after an initial analysis of the documentation (May-June 2014), was to sense check my findings and to 'test' any interesting observations emerging from the texts.

The specific method of these interviews, including practical and ethical considerations, is as per the more substantive interviews undertaken with school Heads (see below). Suffice to say the same rigor and adherence to ethics was also applied here. The only difference between these interviews and those with Heads was location. In all cases the interviews with Heads took place in school-based offices, with the recruitment consultants the interviews took place in public spaces (a coffee shop in each case). Whilst this made transcription more challenging (due to

background noise), given that conversations with the recruitment consultants were much less sensitive than those with Heads, there was no sense that these public locations presented ethical questions. I informed the consultants at the outset that I did not wish to discuss specific schools, just their *sense* of the field in general; nothing confidential or contentious was discussed. However, as with the Heads the consultants were assured of their right to pass on any questions or to stop the interview at any point.

For thoroughness, and to facilitate depth of analysis, transcripts of the three interviews were read-through against the coding categories identified above, undergoing the same multi-stage reading, review and refinement process. However, given that there were only three interviews, they were not formally coded – to have done so would have blurred the intended purpose of simply sense-checking my analysis of the recruitment documentation (and, methodologically, would carry questionable validity). Therefore, presented in Chapter 5, in line with my purpose, are observations on the interviews (as point or counterpoint to other findings) arrived at through an iterative reflexive process.

The three interviewees are identified by the initials AM, AW and AD. The 'A' represents this section of the three methods, the second letter an initial of each participant; this approach allowed me to preserve anonymity while also assisting with my organisation of the data. A brief summary of each recruitment consultant and their respective organisations can be found in Appendix II.

4.5 Part C: Qualitative Interviews

This research component involved twenty-five face-to-face interviews with international school Heads. The intention was to determine how Heads identities are constructed through the power effects of educational and managerial discourses (Research Question III). Having the data from the recruitment documentation review and online questionnaire prior to these interviews enabled me to direct lines of questioning, to be aware of the presence (or lack of presence) of particular practices and discourses within the field and, therefore, to better focus enquiry on which of those discourses were most salient in each Head's identity work.

To 'minimise error, bias and [to ensure] the accurate reflection of that being observed' (Basit and Glover, 2010:55) the breadth and depth of my sample was important. This was achieved through careful balancing of the sample across Heads with varying degrees and types of international school experience. That is, while aiming for 'maximum variation' (Bloomberg and Volpe, 2008), I also aimed to purposively balance interviews across various international school contexts - for-profit and not-for-profit, different ownership structures, and schools with different curricular foci. Moreover, where 'information-rich cases' (*ibid.*) presented themselves I also undertook interviews despite travel inconvenience (flying, for example, to Taipei and Vietnam). In practice then the sampling frame was, in part, one of convenience and, in further part, also purposive (Merriam, 1998) - i.e. informed by the online questionnaire (above), information-rich sites were chosen where travel for interview was convenient and practical.

In the final sample, the Heads interviewed worked at schools in Thailand, Taiwan, Vietnam, Singapore, Cyprus, Japan, China, Myanmar and Malaysia. That said, methodologically, as my unit of analysis is Heads, not schools, it was less relevant where each interviewee was geographically located and more important that each simply had sufficient international experience to have

engaged with the various discourses governing the role. As such, although my sample included experienced and less experienced Heads, I did not include Heads with less than two years' experience. Nor were any Heads included who were in their first two years of an overseas posting; indeed, most had also worked in numerous other countries prior to their current postings and drew on these experiences in the interviews.

My sample also included only those at the top of the school hierarchy. A Head of Campus or Head of School reporting to an overall Head/Principal may have been able to defer engagement in the various discourses, to some extent, to their superior and thus not have been required to undertake the same degree (or the same types) of identity work. In addition, I was careful to include female Heads in my sample. While women are under-represented as international school Heads (Sims-Pottle, 2008), and although my thesis is not focused on gender differences, I felt it was important to include the female voice and, in my analysis, to highlight any pertinent gender issues. For comparison and breadth, also included are a small number of non-Western Heads running international schools (or schools with substantive and distinct international curriculum streams).

In practical terms, to generate the sample, approaches were made to potential interview participants either via the request to participate at the end of the online questionnaire (above) or through personal and network contacts. In some instances, for known associates, I made initial contact myself. In other cases, initial contact was made by DH (see above for biography details). In all cases DH was only making initial introductions, the rationale being that it was often politic and more effective for him to make first contact (as opposed to direct cold contact from me). With that in mind, it should be noted that there was no compulsion arising from this method of approach to agree to take part; DH has no such function or power – all participation was entirely voluntary. If, in their response to DH, those contacted express a willingness to be involved in the

research, I undertook all further communication with them. If requests to be involved in the research were turned down, or if Heads did not respond to introductory e-mails, contact was simply made with other Heads who fit the criteria of balancing the participants across different contexts – i.e. if a Head with experience of not-for-profit contexts declined to be involved, attempts were made to replace them with a different Head with similar not-for-profit experience. In the final analysis only a small number of those approached declined to take part and in all cases this was for practical reasons rather than reasons related to the research itself.

With these considerations in mind, the sample breaks down as:

Heads working in:	For-Profit Schools:	18	(72%)
	Not-for-Profit Schools:	7	(28%)
Heads working in:	Privately-Owned Schools	18	(72%)
	Corporate and Group Schools	7	(28%)
Heads working in:	US Curriculum Schools	4	(16%)
	British Curriculum Schools	10	(40%)
	International Baccalaureate Schools	8	(32%)
	Other	3	(12%)
Gender:	Male Interviewees	19	(76%)
	Female Interviewees	6	(24%)
Ethnicity:	Western	22	(88%)
	Non-Western (Asian)	3	(12%)

As comparison against the general market overview at time of submission indicates (see Chapter 1) the sample is broadly representative of population norms. All of the Heads interviewed also completed the online questionnaire. That said, if they responded anonymously, it was not

possible – nor necessary – to align the online data with the interview subject; though where alignment was possible this helped to guidelines of interview questioning.

4.5.1 Interview Practicalities

All interviews took place (across the various countries) in the Heads' offices or in a meeting room at their school, with the Head and myself the only persons present. The interviews were semi-structured, in-depth and wide-ranging, covering interviewees' personal histories as teachers, their careers as Heads to date and their working life at their current school. The interviews ranged from 1 to 3 hours in length. Prior, in order to refine my interview technique and to sharpen the interview themes, a pilot study was undertaken with three trusted colleagues. Lines of interview enquiry were adjusted in light of feedback; to avoid clouding my findings with results not arrived at through the same themes, the data from these initial trials are not included in this final thesis.

My specific research prompts⁴⁴ were drawn from my literature review and were refined through conversation with my supervisor and other trusted colleagues. I deliberately did not bring up managerialism with Heads, nor did I use that term in the interviews. This was a particular and considered choice. Firstly, to have used academic language within the interviews would have distanced me from the interviewee, reducing rapport and increasing the potential for guarded or politicised responses. To deconstruct their identity work, the interviewees needed to respond openly and honestly. Secondly, use of the term would have been leading; to be valid the governing influences of education and managerialism needed to emerge organically from the interviews, and not be directed in by the researcher (me). The approach was to guide the conversation around a series of issues – the nature of the market, the use of staff appraisal

⁴⁴ See Appendix V; note, in keeping with my semi-structured interview methodology, *prompts* not questions.

systems, for-profit vs. not-for-profit debates, and the use of business language within schools etc. – that would give Heads scope to respond in ways natural to their own sense of self. In some interviews the conversation tended towards the managerial, in others it tended towards the educational, this natural ebb-and-flow informing my lines of enquiry. The purity, consistency and commitment of each respondent's narrative (to education and/or management) was probed and tested, the intent being to draw out (and not direct in) the discourses most salient to each Head's identity work.

4.5.2 Interview Ethics

Given the status of my research participants and my own position within the network, ethical considerations of confidentiality and anonymity were paramount (Blaxter, Hughes and Tight, 2010). Permission both to conduct and record interviews was sought (in all cases supported by a formal letter) and participants were assured of the anonymity and confidentiality of research findings. Participants were also informed, both verbally and in writing, of their right to withdraw from the research at any time. No incentive was offered for participation. Each Head was made aware of why they were chosen (according to the various criteria above). Signed copies of consent forms were collected at interview and, at the outset, Heads were reminded of my research focus, confidentiality reaffirmed and an assurance given that I did not wish to discuss anything that they may consider commercially sensitive or overly personal. I also reiterated that they could withdraw/opt-out of the process at any time.

At the end of each interview I asked participants to reconfirm, via signature, the anonymised use of quotes. Each Head was assured that their names, school name or any other identifying features would be excluded from the final report. At the end of the interview participants were also informed of their right to ask for any record of their interviews to be destroyed. They were

also assured of the security of the recordings and of my research notes (the recorder was passcode locked and stored, alongside my notes, in a secure cabinet to which only I had access). Avoiding what Kaiser (2009) describes as deductive disclosure, where participants are recognisable, by age, sex or by some other trait, in this final write-up no individual school or Head is identifiable. None of the interview participants were relatives, or current or ex-colleagues. All participants were offered a summary of research findings, with anonymity and confidentiality rigorously implemented.

Prior to professional transcribing of recorded interviews, all identifying information was removed from the recording (using Apple GarageBand to cut or mask the offending section of audio) and a filename created such as to preserve anonymity. To ensure confidentiality, two different professional transcribers were used, each receiving a random half of the sample; neither were based in countries (or professions) where the context of this study would have held meaning beyond the abstract. Both transcribers agreed to confidentiality and agreed to delete copies of files after completion.

Printed copies of transcripts, notes from the interviews and other documentation related to my research were kept in a locked cabinet in my home office, itself locked when not in use. In the single case where permission to record was not given, I typed up notes after the interview, storing these notes in the same locked cabinet.

As a result of my CDA methodology, it was felt that returning transcripts to participants would unduly affect my research. What participants revealed verbally they may have been less willing to see in print. Hence, if offered the opportunity to review the transcripts, it was felt that participants might redact comments that, in the harsh light of print, revealed insights they wished to remain hidden; the result being bland, politicised and marketised texts that presented a public

relations view of themselves and their organisations. However, as noted, permission to use anonymised quotes was sought prior to and reaffirmed after the interviews.

With regard to ethics, it is also important to highlight that, despite the obvious convenience of doing so, I did not interview any Heads working for the organisation of which I was an employee at the time. It was felt here that my insider knowledge and the potential for conflict of interest was too great and thus the interviews would not have been valid or any findings credible.

Copies of the all related documents can be found in the appendices.

4.5.3 Coding of Interview Transcripts

As with the recruitment consultants, the interviews were first transcribed - using Apple's GarageBand to review the audio and Microsoft Word for the typed documentation – and then imported into Nvivo for coding.

Methodologically, the coding process itself was the same as that followed for the recruitment consultants. That is, following an inductive coding technique, as outlined by Strauss and Corbin (1990), the transcripts were read 'independently and collectively' (Basil, 2003:8), with each document examined and constantly compared (Glaser and Strauss, 1967) line-by-line in order to generate first-order codes and interpret how different statements might come to represent important narratives (Charmaz, 1990).

These primary narratives related to three interrelated questions used to guide the interview structure:

- What discourses (educational and/or managerial) do Heads draw on/rely on when describing their professional identity?
- Do the Heads defer managerialism to other bodies/other selves?
- Do the texts evidence hybrid identifications?

With these questions in mind, each word, line and sentence of the individual transcripts was examined in order to seek out possible relationships (Basit, 2003). This was done firstly to prioritise their significance, and secondly to forge connections that may help to identify possible categories (Silverman, 2005:171-187). Data that emerged from this process were categorised and given a code (Table 9). Initially this process involved a simple read through of each document, an open-coding methodology (Berelson, 1952) intended to identify key phrases, terms or expressions that made 'inchoate sense' (Sandelowski, 1995:373). After a first read through the broad narratives I identified were, via further read through, dimensionalised (Strauss and Corbin, 1990) into specific categories and, after yet further read-throughs, these categories themselves further deconstructed into specific codes (called Nodes within Nvivo); each code/node representing particular 'words, phrases or sentences' that helped to 'trigger the construction of a conceptual scheme' (Basit, 2003:4-7). This was a highly iterative process involving many adjustments to categories and codes as I worked through the process of 'making sense of what [I found] after [I had] found it' (Gillham, 2000:6).

In order to develop a systematic and manageable approach, as Basit, (2003) suggests will occur in any rigorous coding process, new codes were added, merged, or recategorised as my understanding of the data developed. Overall, under three themes, seven categories and a total of twenty-four codes (including two sub-codes) were identified. Each of the themes has their own distinctiveness, nonetheless, due to the multiplicity and cross-over of many of the codes and categories the themes are also inter-connected; for example, as Table 9 shows, the code 'Managerial Changes to Role' generated insight into four categories across two themes. As with

coding of the recruitment documentation, underpinning this analytical process was constant reference to the literature as laid out in Chapter 3 and, in particular, the works citing potential identifiers of managerial practice. For example, particularly instructive was Knights and McCabe’s (2001) observation that actors more inclined to managerialism will celebrate its language and practices, whereas critics will denounce or bemoan the same.

In practical terms, transcripts were first explored for the way Heads talked about their identities, or the ways in which they related to practice. Each document was further coded for instances when interviewees talked about being an ‘educator’ or ‘manager’ (plus, relevant subsets of those terms and other indicators revealed through a CDA/SCA approach). Also coded were the connections Heads made between themselves and their experiences – whether, for example, management was discussed in a mundane, functional manner (“management is part of the job, sure, but it’s not who I am”; Interviewee C12) or whether management was more readily embraced (“[it] strengthens my hand in all sorts of ways”; Interviewee C9). Following first-order coding, in second-order coding a variety of overarching categories were identified (see below), and specific exemplars grouped within these domains. This process resulted in the following coding structure (also copied in Appendix VII):

Table 10: Interview Coding Structure

'In vivo' Codes	Second-order Codes	Thematic Codes	Overall Theme
“That is not who I am” (IC24); “It’s just a job title, I didn’t choose it. It makes no difference to what I do – I am a Principal” (IC10); ‘I would walk if any sense of commercialism came before education’ (IC20)	Educational Identification	Framing identity	Identity Work
“...in my eyes I have to alert teachers that these are <i>clients</i> (IC1); “I understand the real world, because in a <i>real corporate world</i> if you are part of a team that fails or screws up a project, you are fired. For some reason, teachers don’t get that. (IC23)	Suggestions of Managerial Identification	Discourses drawn on in identity work Evidence of managerialism ‘in here’	

<p>"The <i>business side</i> of things give me a kick" (IC15);</p> <p>"...I think the corporate model is the better one for the future. It is the better-informed, it's the better-connected, and there is more <i>management expertise</i> out there to access." (IC4);</p>	<p>Alignment to Management (Practice)</p>		
<p>"...it goes right down to the child; that's got to be the core of everything we do...it's not tins of beans, it's children" (IC11);</p> <p>"You have to say: "I am accountable, I'm responsible for your child"; if you've never done that, if you don't know what it <i>means</i> to put the student first you've got no business being a Head" (IC11)</p> <p>"[The Head will] provide professional instructional leadership and modelling...that establishes the school as a centre of educational excellence" (RC50)</p>	<p>Reference to the profession of Headship</p>	<p>Evidence of managerialism 'out there'</p>	<p>Professionalism</p>
<p>"Yea, we started that [distributed leadership] a few years back...it was one of those things, you know, something all schools seem to have a go at" (IC11);</p> <p>"Distributed leadership has become something that most schools do. I remember it starting back in the early 2000's, probably some conference somewhere." (IC4)</p> <p>"Fancy job titles certainly seem to be creeping in. The cynical view would say that the roles are exactly the same, but the fancy title gives the Head, whatever he [sic] gets called, more status" (AD);</p> <p>"...my KPI's are the same as pretty much <i>all</i> Heads, roll growth is one of my targets" (IC5);</p> <p>"You have to fit in, you have to walk the walk and talk the talk. (IC12)</p>	<p>References to network influences</p>		
<p>"You can't employ a Head who hasn't got any business knowledge. That would be commercial suicide, clearly." (IC24);</p> <p>"I'd like to think of myself being an eight, but the reality of what I do on a day-to-day basis, and the reality of how I impact the school, is probably a six." (IC11);</p> <p>"It has to be a balance between our educational strength, our commercial sense and our vision" (IC21)</p>	<p>Educational Requirements</p>	<p>Evidence of hybrid identifications</p>	<p>Hybridity</p>
	<p>Manager Requirements</p>		

Using this coding structure, in total, approximately 2,402 incidences of significant language/phrases were recorded. As above, these are not intended to be quantitatively representative; the quantities were simply used to inform my reading of the data – reviewing the incidences helped me to iteratively consider *how* I was reading the texts, resulting in the necessarily reflexive approach required of qualitative research.

Notably, during the process some codes became redundant while other previously unconsidered elements of data revealed themselves as useful. As data emerged it become clear, for example, that the for-profit not-for-profit distinction was a red herring, more useful was to explore the approach each Head took regardless of their context – which discourses, regardless of context,

seemed to offer the most identity salience. Nonetheless, unless a particular code referred to very contextually specific data and/or was outside of my overall theme, all codes, redundant or otherwise, have been retained. For instance, one Head referred to a building project that was originally coded under ‘Projects Management’, after transcribing all interviews this was, however, the only code in this category and, on reflection, the data did not relate to any of my themes, the code was thus deleted. In other cases, the code ‘Tensions Between Heads and Owners/Board’, for example, it became clear that the text was revealing only tangential insight into my themes but that it was a significant part of the overall narrative, the code was hence retained (potentially for later analysis as needed). Table 11 details the incidence of each code and their categorisation.

Table 11: Coding table for face-to-face interviews

CATEGORIES	WHAT DISCOURSES DO THE HEADS DRAW ON IN THEIR IDENTITY WORK?			EVIDENCE OF EXTERNALLY IMPOSED MANAGERIAL REQUIREMENTS		DOES THE TEXT EVIDENCE HYBRIDITY?		EXPLANATION
	EDUCATIONAL	MANAGERIAL (PHILOSOPHY)	MANAGEMENT (PRACTICE)	REFERENCE TO PROFESSIONALISM	REFERENCE TO NETWORK INFLUENCES	MANAGER IDENTITY	EDUCATIONAL IDENTITY	
	DO THE TEXTS EVIDENCE HYBRIDITY?							
WHEN DESCRIBING THE PURPOSE OF SCHOOL OWNERSHIP	17	45	9					Heads description of owners purpose (profit, legacy etc); a potential indicator of managerial thinking/pressure
WHEN DESCRIBING BOARD STRUCTURE/GOVERNANCE	20	37	12					Heads description of Board and Governance arrangements; a potential indicator of managerial thinking/pressure
WHEN DESCRIBING THE IMPLICATIONS OF CORPORATE OWNERSHIP	56	106	87					Heads description of implications of corporate ownership; a potential indicator of managerial thinking/pressure
WHEN DESCRIBING THE OWNERS VIEW OF HEADSHIP	2	12	78					Heads description of how school owners/Board view the role of Head (educational or business)
WHEN DESCRIBING TENSIONS BETWEEN HEAD & BOARD/OWNERS	45	48	21					Heads descriptions of any tensions between themselves and owners/Board (potentially indicating tensions between educational and commercial priorities)
WHEN DESCRIBING FOR-PROFIT PRESSURES	27	69	6					
EVIDENCE OF BUSINESS-THINKING			97			76		Unsolicited evidence of the Head demonstrating business-like thinking
WHEN DESCRIBING LINKS A SCHOOL BUSINESS MANAGER	4	15	-			8	34	Reference to Business Manager post (with regard to business-related tasks and Heads responsibilities/identity)
WHEN DESCRIBING THEIR IDENTITY	356	181				97	181	Descriptions of Self and role as educational
MANAGERIAL CHANGES TO ROLE/MANGERIAL EXAMPLES	19		55			36	15	Descriptions of managerial changes to role
EVIDENCE OF PLURALITY		34				8	34	Description of role/identity including dual element of education and business
EVIDENCE OF FINANCIAL PRESSURE	-	6	24			14	37	Evidence of Heads facing financial pressure
EVIDENCE OF STAFF/HR ISSUES	32	21	17			2	17	Evidence of Heads facing Human Resource pressures
REFERENCE TO QUALIFICATIONS	59	12	23			8	23	Heads responses to questions related to desirable qualifications
REFERENCE TO EFFICIENCY	4		9			5		Unsolicited references to efficiency that evidence managerial thinking/language
(UNSOLICITED) REFERENCES TO OTHER SCHOOLS					69			References to other schools; perhaps to illustrate a point or to draw comparison
(UNSOLICITED) REFERENCES TO COLLEAGUES IN OTHER SCHOOLS					23			References to colleagues (Heads) in other schools; perhaps to illustrate a point or to draw comparison
(UNSOLICITED) REFERENCES TO OTHER NETWORK AGENTS					14			References to network agents such as recruitment consultants; perhaps to illustrate a point or to draw comparison
(UNSOLICITED) REFERENCES TO NETWORK ASSOCIATIONS					31			References to network associations and any resulting pressure for change
(INDIRECT) REFERENCE TO PROFESSIONAL CONSCIENCE				33				Evidence of Heads describing behaviour (knowingly or unknowingly) suggestive of professional discourses
REFERENCE TO PROFESSIONAL COGNITIONS				47				Evidence of Heads describing (knowingly or unknowingly) potential network cognitions
EVIDENCE OF PERCEIVED PROFESSIONAL NORMS				36				Evidence of Heads describing (knowingly or unknowingly) specific professional network practices
WHEN DESCRIBING COMPETITIVENESS						47		Reference to competitive nature of the schools' market and/or the market in general
WHEN DESCRIBING THE MARKET/ECONOMICS						6		Reference to market or economic factors

Although the process of ‘coding’ and ‘analysing’ are not synonymous, coding *is* a vital aspect of analysis (Basit, 2003:5). Thereupon, to augment my *analysis* I printed a full version of all transcripts and read through them ‘offline’. Highlights, written memos and coding references were added to these printed transcripts as I worked through them. This extra step ensured that I was not missing anything by reading the text solely on-screen and it helped me return to the texts, via the new medium, with fresh eyes. Following the paper-based read through adjustments were made to the electronic categories and codes within Nvivo. This approach supported the credibility of the data and the analysis process because it minimised the possibility of using only a narrow frame of reference in order to fit any preconceived assumptions held by the researcher and/or to fit with any analytical claim made in the research (Silverman, 2010:298). This process was also useful in identifying contrary examples; each set of codes was (re)read with positive and negative examples of the code highlighted in different colours. These printed sheets were then, individually and collectively, and in conjunction with Nvivo, used in the analysis and write-up of each theme.

4.6 SUMMARY

This chapter has suggested that all of the various methodologies can be seen to hold valid epistemological and ontological positions. The world around us is socially constructed (and reconstructed) and research, therefore, inevitably ‘interpretative and hermeneutic’ (Pring, 2007:56). However, there are also predictable and habitual features of that social construction that can, even if not stated as absolute truth, be objectified, quantified and reported positivistically. Choice of method is not about which research paradigm is *better* or which might produce supposedly *truer* results – debates that are likely to rage for many decades to come – rather it is about validity, reliability and appropriateness to task.

One must, nevertheless, take a position. Research can only be effective if one understands the distinctions and limitations of each methodology and, to some extent, picks a side. The side chosen here is interpretative; that choice being based on an epistemological stance which sees knowledge (especially in relation to the formation of the self) as subjective, and understanding only possible through an investigation of how people see, think, and feel about the world.

As the chapter also outlines, this position is not taken to the exclusion of pragmatics. Without abandoning its interpretative position, the study recognises that a variety of methods (quantitative and qualitative) can be used to support interpretation. Adopted for this study was, therefore, a mixed-methods approach that utilised both quantitative (an online questionnaire and recruitment documentation analysis) and qualitative techniques (face-to-face interviews). Underpinned by Critical Discourse Analysis, each method formed 'part of the analysis framework' (Mason, 2010:4) and gave opportunity to reveal and describe which discourses – educational and/or managerial – might be influencing the professional identity work of international school Heads, and with what implications.

Throughout, this chapter has also made it clear that the British Educational Research Association's *Revised Ethical Guidelines for Educational Research* (2012) informed, in both principle and practice, all decisions related to the specific method/s undertaken. The next chapter provides a detailed analysis of the research findings.

CHAPTER 5 – DATA ANALYSIS

In the previous chapters, the context of international schooling, the theoretical foundations of identity work, discourse, managerialism and the resultant effects on and potentials for hybrid professional identities have been discussed and analysed. Reporting on an analysis of recruitment documentation, results of an online questionnaire and the outcomes of face-to-face interviews (methods A, B and C, respectively, as detailed in Chapter 4), this chapter addresses the three research questions in turn:

- I. What forms of managerialism, if any, are emerging within international schools which might exemplify the antecedents of managerial identities?
- II. Which discourses, educational and/or managerial, seem dominant in the processes of identity formation for international school Heads?
- III. What are the outcomes, in terms of their professional identity work, for international school Heads as they reconcile the plural demands of education and managerialism?

The chapter proceeds, in relation to the first research question, by considering whether the antecedents of Heads' responses to managerialism might be found in the practices and policies of international schools. An important theme of this analysis is whether Heads are governed towards managerialism as a *response* to embedded practice (ascertained through an online questionnaire, Part A) and/or by the formal requirements of the job (analysis being via review of job descriptions, Part B). Data selection is, therefore, on the basis of sources that indicate where managerial practice has been adopted and, as importantly, examples of where it has not.

The second section, addressing Research Question II, deconstructs the various texts further, observing the prevalence and prominence of educational and managerial discourse. That is, examination focuses on which discourses seem to be allowing for/constructing an environment whereby the processes of educational and/or managerial identifications might be privileged. In

this analysis each source of data (questionnaire, interviews and recruitment documentation) offers different nuance and different insight; the extent of managerial discourses (as opposed to educational discourses) is, for example, analysed in the language of job titles (via data derived from the online questionnaire) and is enriched via supporting evidence from interviews with recruitment consultants. Selection of data from across the sources is based on findings which best illustrate the discourses seemingly affecting Heads' identity work.

Finally, the chapter turns to Research Question III and to the identity work of international school Heads – the primary source of data being twenty-five face-to-face interviews (Part C). In particular, the analysis considers the relationships of power between educational and managerial discourses and the outcomes of these influences. Are Heads governed as educators, managers or as a blend of both?

Across the analysis, where relevant distinction is drawn between practice and discourse as found in for-profit, not-for-profit and corporate international school contexts. In most cases, these distinctions were nominal (analysis therefore drawing on aggregate data from all school types), however, where there was interesting variance, the analysis (and, where pertinent, graphical representations) bring attention to these differences as they bear down on identity work.

In the online questionnaire, the total sample size was 150 schools. As not all schools responded to all questions, the number of respondents is given ($n=$) for each data set. The recruitment documentation review is based on 100 sets of documents. With regard to the face-to-face interviews, a biography of each participant can be found in Appendix II; the recruitment consultants are labeled AW, AM and AD, the Heads Interviewees C1 through C25.

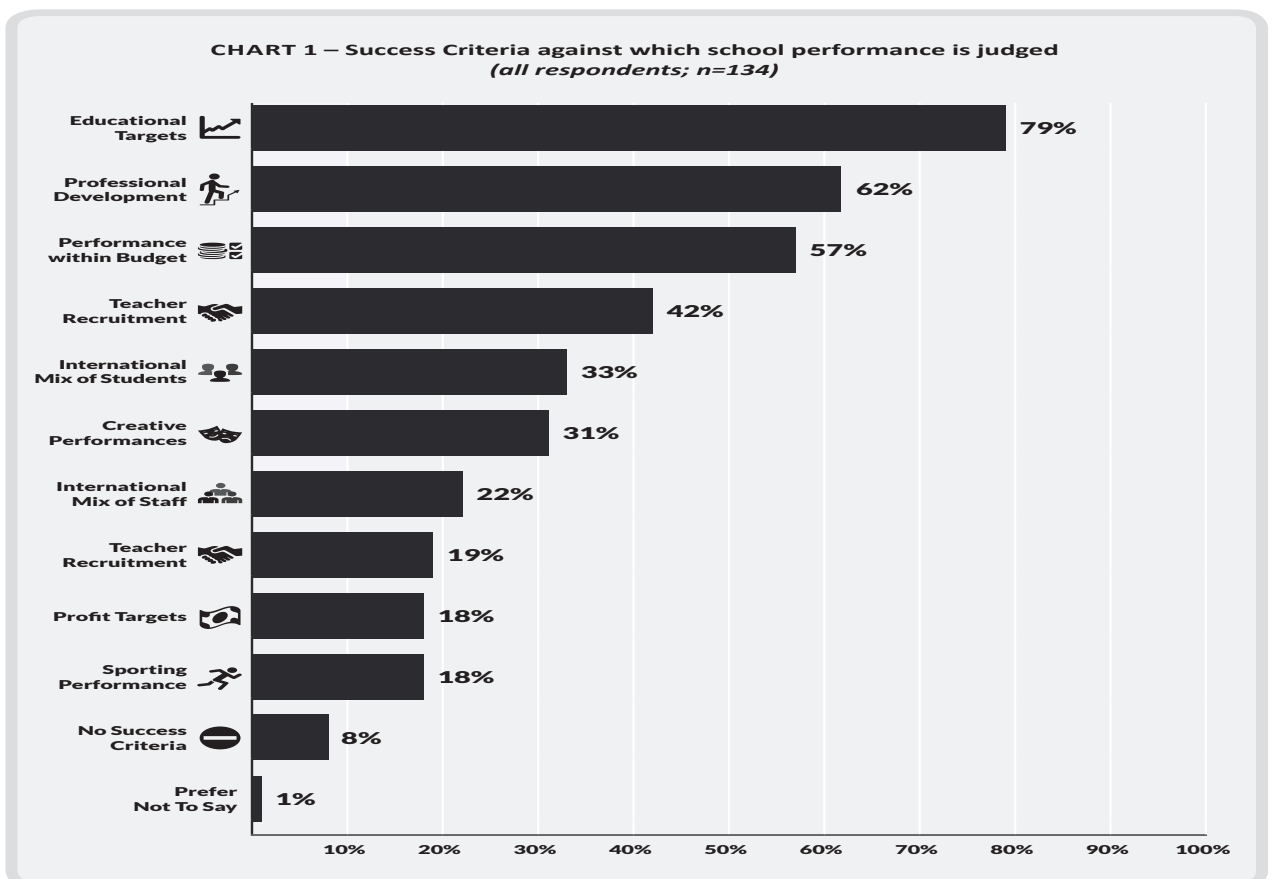
5.1 RESEARCH QUESTION I (RQI)

PART A: RESULTS FROM THE ONLINE QUESTIONNAIRE

Examining first the results of the questionnaire, supplemented where relevant with findings from other research methods, the following was found with regard to what evidence, if any, is apparent across the sampled schools that might exemplify the antecedents within international schools for identity work in response to embedded educational and/or managerial practice.

5.1.1 Accountability to Performance Metrics

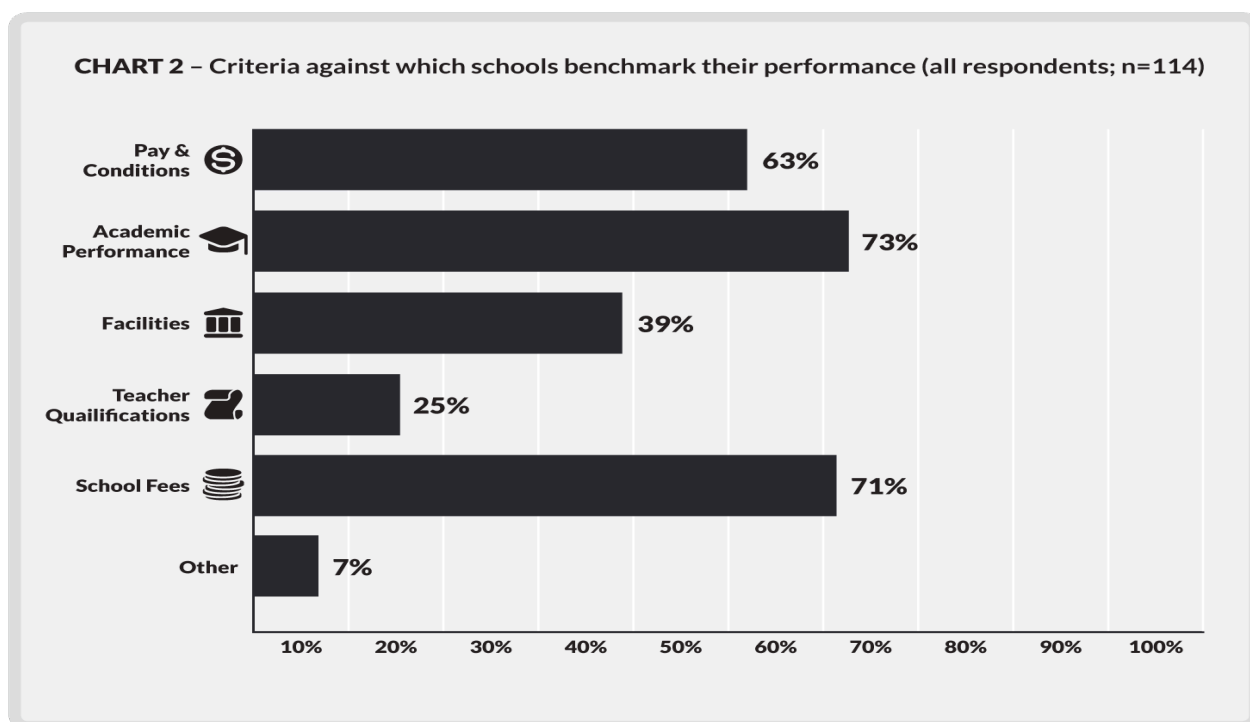
Mindful of literature suggesting that managerialism in state-controlled education is apparent through ‘forms of governance (measurement, surveillance, control, regulation) that are often antithetical to the caring that is at the heart of good education’ (Lynch, 2014:5-6), participants were asked against what performance criteria the school was assessed:



As shown, only 8% of respondents indicated that 'no success criteria' were used in their context. Nearly 80% of the sample claimed to be accountable to educational targets. In one setting, corporate managers even go so far as to measure financial "return per classroom" (*Questionnaire Respondent 49*). At the outset then is seen evidence of managerialism; the sampled schools *are* held accountable to various measures of performance.

That said, with very few notable exceptions (*Respondent 49*, above, for example), explicitly business-like targets were by no means dominant. Not shown in Chart 1, but nonetheless evident in the questionnaire data, profit is more important in for-profit and corporate contexts (35% and 24% respectively) as compared to a sample average of 18%, but even in those contexts its importance falls well short of specific educational targets (75% and 82% correspondingly). The for-profit and corporately owned schools report a greater concern with profit than the not-for-profits (9%) but overall, for all school types, educational success seems to hold the greatest salience.

However, as the distinction between management and managerialism drawn in the literature review indicates, that is not to say that educational targets are not themselves exemplars of managerialism. As has been argued, managerialism can and does take form in non-commercial ways. This possibility was explored in questions related to benchmarking.

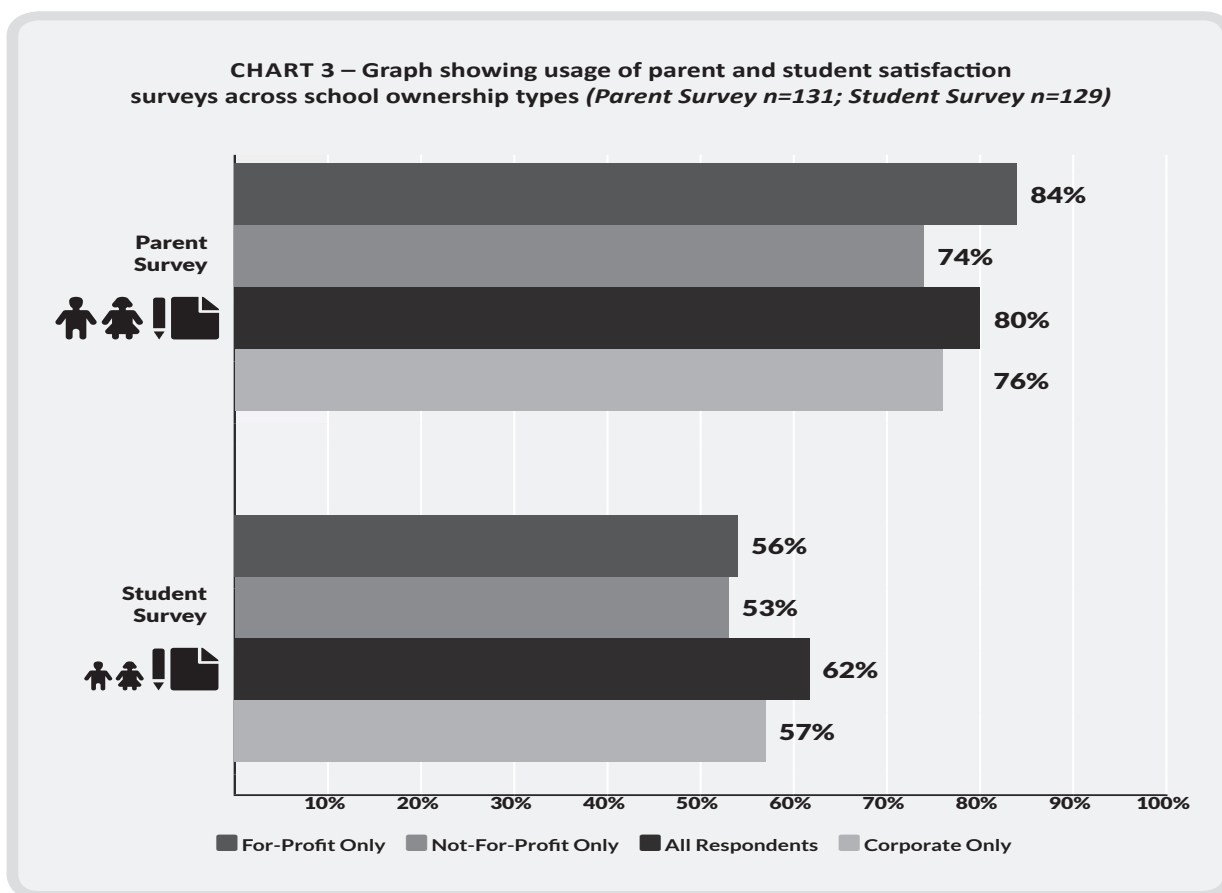


Evidencing managerialisms obsession with target-setting, returns from the questionnaire showed that the majority of sampled schools engage in benchmarking of one form or another. It is not, however, solely the prevalence of benchmarking that is revealing, but also *what* schools benchmark against. Benchmarking covers not only academic performance (73%) but also extends to criteria such as fees (71%), pay and conditions (63%), facilities (39%) and teacher qualifications (25%). Here then is evidence of managerial calculability - crude comparisons, as one particularly disenfranchised respondent noted, of “the number of tennis courts, the size of the swimming pool and the number of seats in the auditorium”; *Questionnaire Respondent 37*.

Moreover, the small relative differences between what gets benchmarked suggests that measurement of school fees (71%) and pay and conditions (63%) matter to a similar degree as academic performance (73%). Profit may not be a primary success factor (see above) but the economics of education clearly matter. Schools, as the literature highlights (Marginson’s 1997 text *‘Markets in Education’*, in particular), are seemingly concerned with their position in the market *vis-à-vis* school fees, the marketability of teacher qualifications, the prestige of school

facilities *and* academic performance; an observation that highlights the multiple and potentially conflicting managerial (if not, perhaps, business) priorities placed on school Heads.

Finally, with regard to the extent to which international school leaders are held accountable through performance metrics, the questionnaire asked participants to indicate whether they use parent and student satisfaction questionnaires:

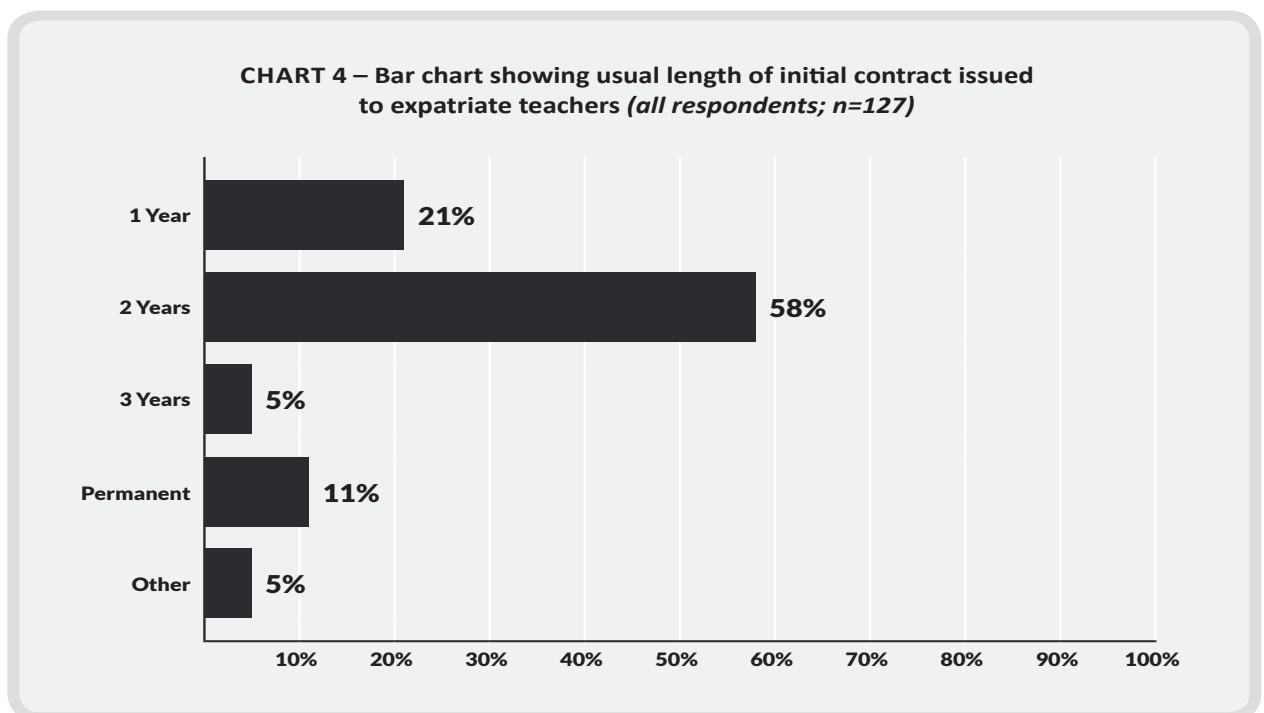


A full 80% of all schools within the sample undertake annual parental satisfaction surveys, 62% undertake student satisfaction surveys. The questionnaire also revealed that both parent and student surveys were undertaken in more international schools than *teacher* satisfaction surveys (56%; not shown here); evidence of managerial accountability to internal and external *customers* more so than to non-revenue generating *stakeholders*.

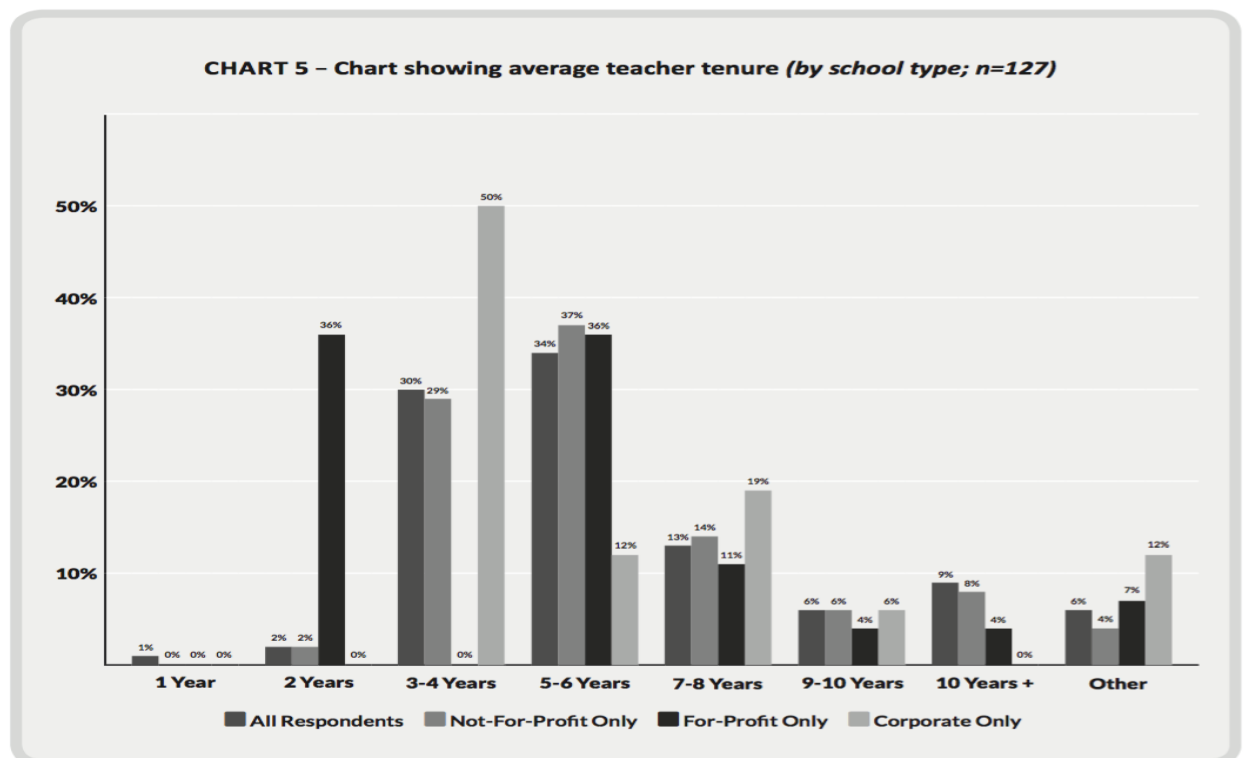
5.1.2 Teacher Contracts, Tenure and Turnover

The literature review also suggested movement towards fixed-term contracts (Gewirtz *et al.*, 1995) and labour replacement (Ball, 2008) as indicative of managerialism.

In regard to the former, due to the transient nature of the globally mobile transnational elite both the demand- (schools need for teachers) and supply-side (teachers desire for contractual flexibility) of the recruitment market traditionally favours fixed-term contracts (Hayden and Thompson, 2008). Fixed-term contracts, according to the recruitment consultants interviewed, have always have been the norm within international schools. When committing to a new school (often in a new country) many teachers favour shorter contracts, some being reluctant to sign for longer periods even when longer contracts are offered. Thus, under investigation is not the *presence* of fixed-term contracts (that was a given), rather the length of those contracts and a comparison with length of teacher tenure.



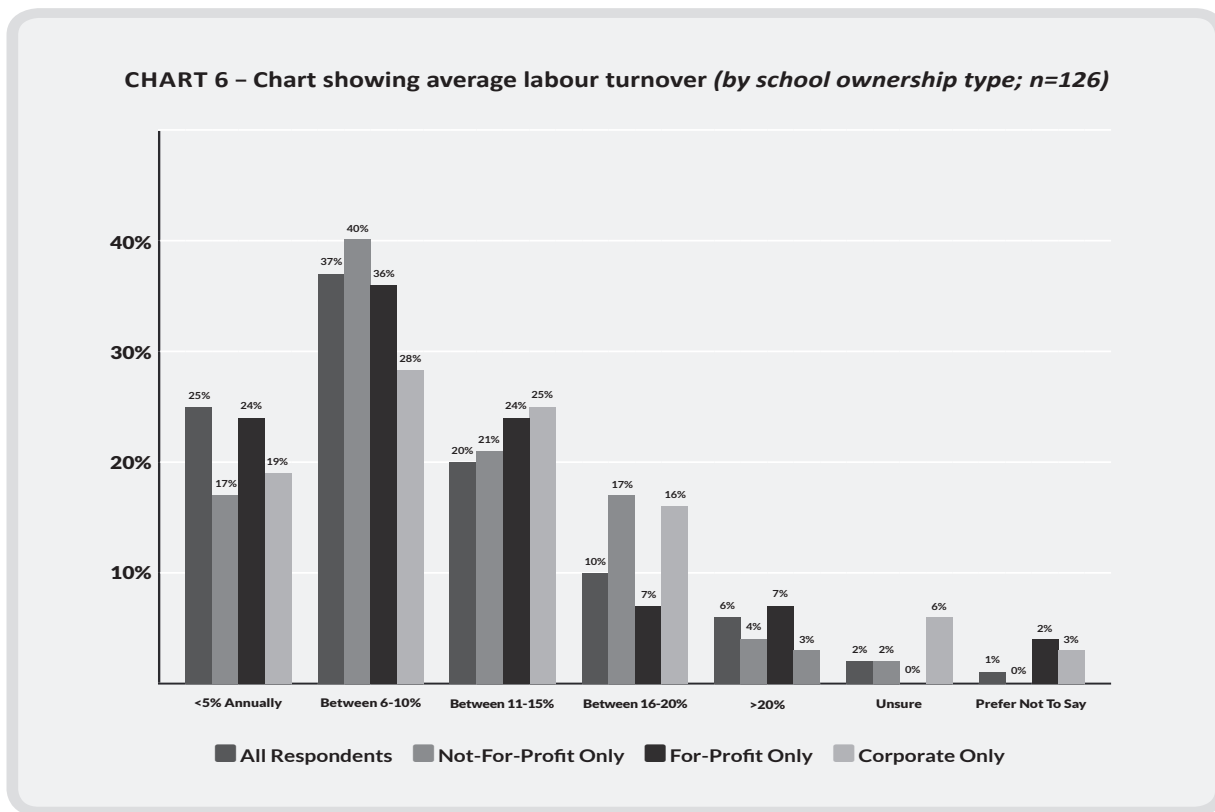
As the data shows, two-year, and to a lesser extent one-year, contracts seem to be the norm (with little difference reported between ownership types). Thus, if shorter contract lengths do indeed evidence managerial practice, then international schools might be argued, in this regard at least, to be operating managerially. This contention is all the more valid when one compares average contract length against average tenure:



What such comparison reveals, within this sample at least, is that average contract lengths are shorter than average tenure. Across the sampled schools, average tenure is between 3-6 years, in other words approximately two or three contract terms – a finding that begs the question why schools do not offer longer initial contracts or longer contracts on renewal (a question turned to in the summary below).

Regarding the tendency of managerialism to reveal itself in labour replacement (Ball, 2008), a further line of enquiry involved labour turnover. If managerial practice was dominant in international schools (and perhaps particularly so in certain types of schools), and if, as the

literature suggests, faced managerialism teachers might want to ‘save themselves’ and ‘get out’ (see: Travers and Cooper, 1996; Carlyle and Woods, 2002; Ball, 2003a), then one might expect to see high levels of labour turnover. That appears not to be the case:



Not only is there limited difference between turnover in any one type of school, in general there is also no significant differential between these figures and values of 14.3% for US teachers (Simon and Moore-Johnson, 2013) and 18% in the UK (NCSL, 2008)⁴⁵. With a sample median of 11%, international schools are well in line with (indeed, better than) these norms. Labour turnover, it seems, is largely unaffected by type of school ownership and nor is there evidence of the suggested consequences of managerial practice. Whilst some schools do have annual labour turnover greater than 20%, on average, international school teachers do not seem, in contrast to suggestions in the literature, to want to ‘save themselves’ and ‘get out’.

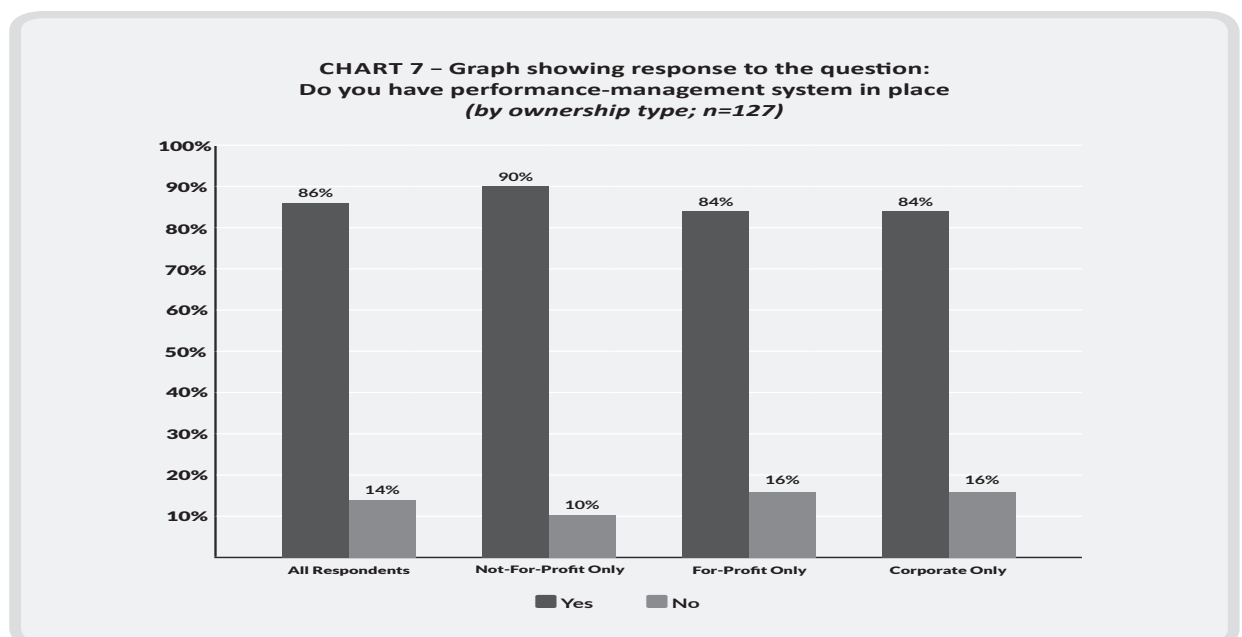
⁴⁵ It is perhaps somewhat ironic that given the wide reporting of an increasingly data-driven educational environment up-to-date UK teacher turnover figures are exceptionally difficult to come by. The annual School Workforce Survey issued by the UK Department for Education reports increases in teacher numbers but not, citing poor quality data, teacher turnover (gov.co.uk, 2015).

Of course, by comparison with Australian, UK and US schools where managerialism is reportedly prevalent (Ball, 2003a; 2003b; 2012, 2015), it may be that international schools simply represent the lesser of two evils. If the alternative to working internationally is the even more managerial environment of the UK (or US), perhaps it is simply the case of ‘better the devil you know’; teachers stay in international schools because the alternative is no more appealing. It helps too, of course, as Hrycak reports (2015), that many international schools are located in countries that enjoy far better weather and far better standards of living than the UK or the US!

5.1.3 Appraisal/Performance Management

According to the literature, educational professionals most readily experience managerialism through performance management and performance-related pay (Gewirtz *et al.*, 1995; Ball, 2012a/b, 2015). To investigate the extent of such practices within international schools, the questionnaire asked a series of questions with regard to appraisal, pay and performance.

Regardless of ownership type, questionnaire responses indicated that the majority of sampled schools (86%) have in place some form of performance management system:



If the presence of performance management is a marker of managerialism, that marker seems to have been placed firmly within the world of international schooling. Only in a very small number of the sampled schools (14%) are teachers free from performance audit.

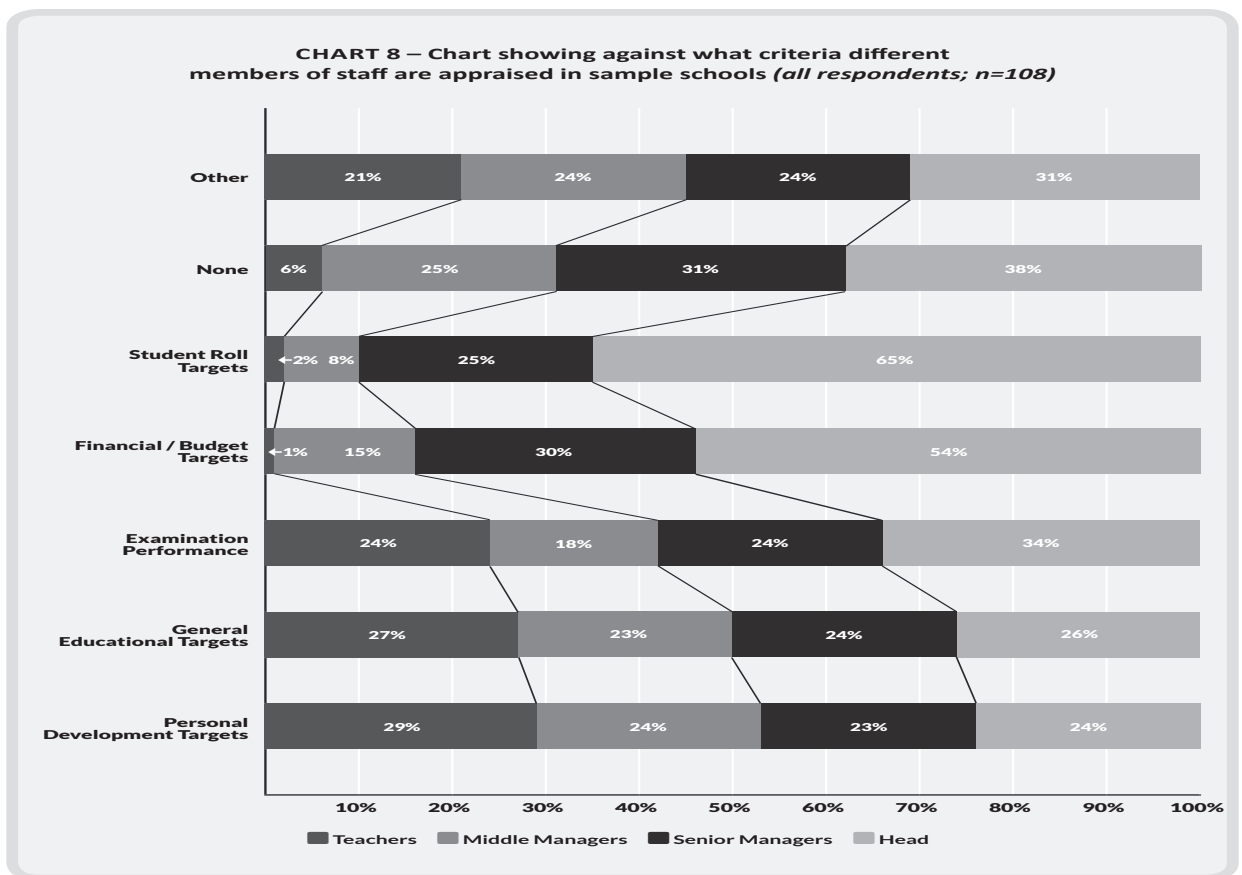
Reinforcing this finding, in the analysis of recruitment documentation, management of appraisal came through strongly as an influence on Heads' occupational practice:

“To implement and sustain effective systems for the management of staff performance, incorporating appraisal and targets for teachers”
(Recruitment Document 12)

“Ensure individual staff accountabilities are clearly defined, understood and agreed and are subject to rigorous review and evaluation” (Recruitment Document 46)

Performance management, it seems, is part of international school life. As the recruitment documentation outlines, it is likewise part of a Head's responsibilities to manage professional performance (notably for this study, thereby also giving Heads the power to determine what actually are legitimate and successful professional performances).

Of course, the presence of an appraisal system is not in itself evidence of *managerialism* – at its most benign, it might be considered an act of *management*. Arguably more relevant is *what* appraisal actually measures and what discourses managers draw on when designing and implementing appraisal systems. To investigate the first of those points (the second addressed as part of RQII) questionnaire respondents were asked to indicate against what criteria staff were judged:

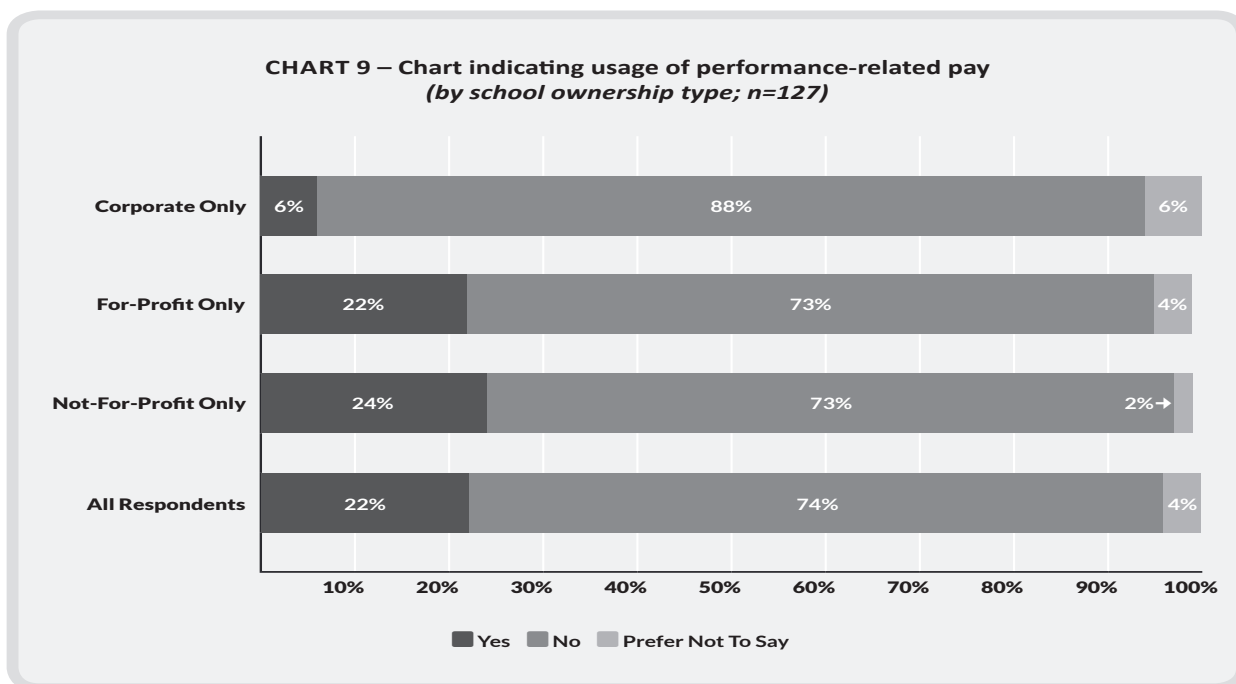


Worthy of comment in relation to this data are the differentials between appraisal against targets that might evidence managerialism and appraisal against educational targets. Considering the full sample, 65% of Heads claimed to be accountable to student roll targets and 54% against financial targets; in contrast a smaller proportion claimed to be appraised against general educational targets (26%), professional development targets (24%) and even examination results (34%). While managerially-inclined performance management does not yet seem to extend to teachers (few schools seems to appraise teachers against managerial targets), the evidence does suggest a leaning towards managerialism so far as Heads (and to a lesser extent Senior Managers) are concerned; the privileging, as Ball (2012) notes, of managerial systems over educational ones.

Finally, in consideration of appraisal, participants were asked to indicate whether a system of ‘forced ranking’⁴⁶ was used. Popularised at General Electric in the 1980s, and colloquially known as ‘rank and yank’, forced ranking is found in numerous commercial organisations – in one study of 200 UK firms, 45% claimed to use the system (MacLennan, 2007). Within this project, 65% of participants ($n=109$) indicated that forced ranking was not used, with a further 29% indicating that they were not even aware of the practice. In total, only 6 respondents claimed to use forced ranking (3 for-profits and 3 not-for-profits). Perhaps offering some solace to educationalists, international schools do not seem to have (yet) adopted this contentious and highly business-like practice.

5.1.4 Performance Related Pay

With performance increasingly being linked to pay across educational sectors (Carter, Stevenson and Passy, 2010) questionnaire respondents were asked to indicate whether performance-related pay (PRP) was used in their context:



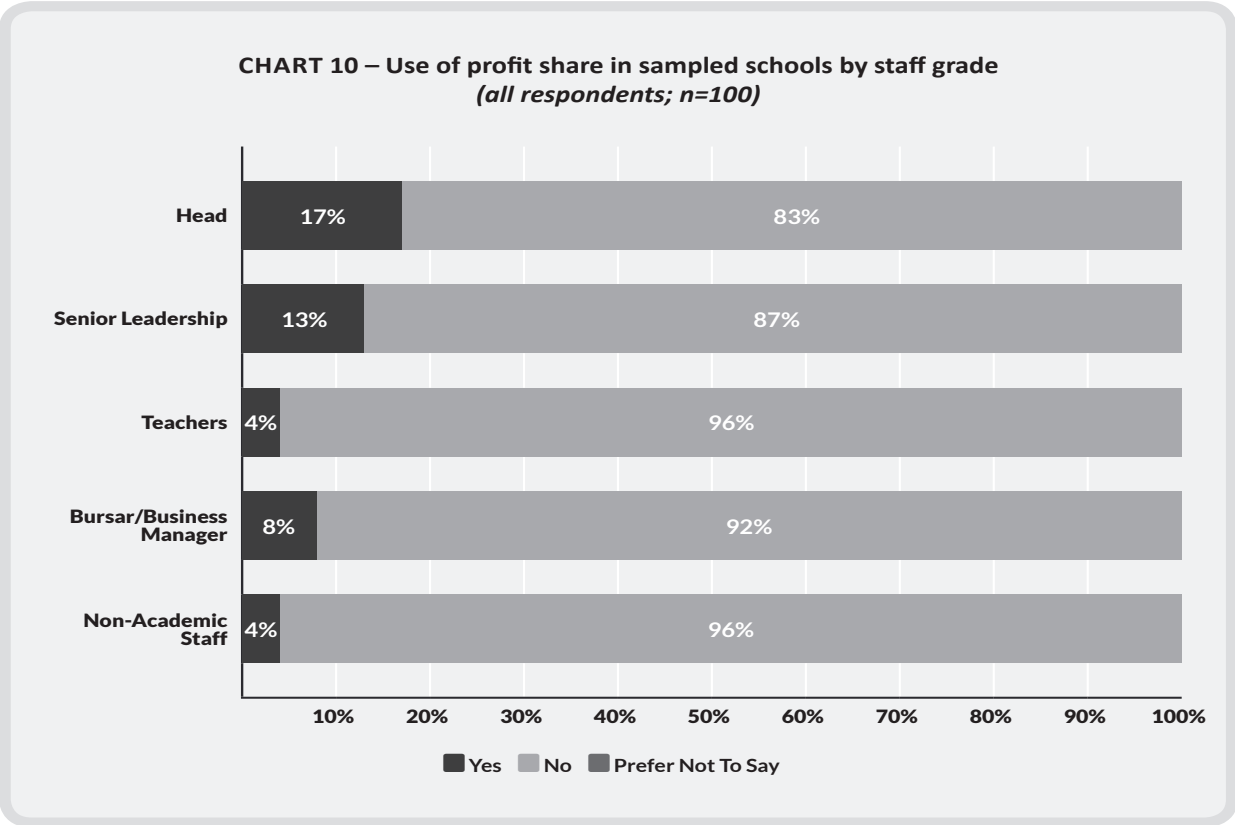
⁴⁶ Forced ranking is a group-referencing system whereby staff are ranked in performance categories from high to low. Based on the philosophy that some staff must be performing better than others, managers are ‘forced’ to rank staff into categories. Applying, for example, a 20-70-10 ranking would see 10% of staff ranked as underperforming regardless of their actual performance (i.e. underperforming relative to their peers). (Grote and Grote, 2005)

Whilst the differential is minimal (and within the margin of error so not statistically significant) interesting within this data is that a greater proportion of not-for-profit schools use PRP than do other forms of school ownership. Similarly, also notable is that the proportion of corporately-owned schools offering PRP was lower than for other types of ownership. Those observations aside, it is clear that PRP is not widely used in the sampled schools. It seems that this particular managerial tool, while becoming common in the UK (School Teachers Review Body, 2012), is not yet common internationally.

In consideration of the claim in literature that tiered employment systems are common place (Bach and Bordogna, 2011), respondents were also asked to indicate whether a quota system was used with regard to the number/proportion of staff on certain pay grades. Overwhelmingly across the 86 schools who answered this question, the response was “no” (90%). In total only 9 schools (10%) claimed to use a quota system, 6 of these were not-for-profit, 2 corporate schools and 1 for-profit. Again then, while there is very slight evidence that not-for-profit schools are more advanced in their managerial thinking, in general, there is limited evidence of managerialism within the sampled schools’ salary systems.

5.1.5 Profit Share

In the case of the for-profit and corporately owned schools, participants were asked to indicate whether any grades of staff were offered profit share:



As the data shows, profit-share is clearly a managerial technology not yet widely adopted in the sampled international schools. A small number of Heads (17) enjoy (if enjoy is the right term) profit-share, but they are in the minority and a number of these indicated in their comments that they were the founders of the school and shareholders in the company and thus not on employee profit-share *per se*.

5.2 PART B: RECRUITMENT DOCUMENTATION REVIEW

Where the above refers to managerial practices found across international schools (ascertained via online questionnaire), here attention turns specifically to the role of Headship. Which practices are most evident in the recruitment documentation pertaining to the occupational requirements of Headship?

5.2.1 Incidence of Educational Practice

Alongside a process of coding, Nvivo was used to identify word repetitions and associated synonyms that might point to particular practices being common across the recruitment documentation. A full list of the 50 most frequent terms found across the 100 sets of recruitment documentation is presented in Appendix I, included below are only those terms most notable for analysis. For comparison, the overall frequency rank of each term is provided in the left most column.

Table 12: Word Frequency Analysis of Headship Job Advertisement and Job Descriptions

RANK	WORD/PHRASE	COUNT	%	SIMILAR WORDS
1	Schools	2011	4.51%	school, schooling, schools
2	Develops	550	1.23%	develop, developed, developer, developing, development/s, develops
3	Students	490	1.10%	student, students
4	Managing	427	0.96%	manage, managed, management, manager, managers, manages
7	Leadership	285	0.64%	leadership
8	Principal	267	0.60%	principal, principals
12	Curriculum	227	0.51%	curriculum, curriculums
13	Successful	213	0.48%	success, successes, successful, successfully, succession
14	Director	188	0.42%	director, directorate, directors
15	Professionals	184	0.41%	professional, professionalism, professionally, professionals
20	Vision	132	0.30%	vision, visioning
21	Strategic	131	0.29%	strategic, strategically
28	Promote	113	0.25%	promote/s, promoted, promoter, promoting, promotion, promotional
41	Accounts	79	0.18%	Account/s, accountabilities, accountability, accountable, accounting
44	Outstanding	77	0.17%	outstanding
46	Children	75	0.17%	children
49	Headteacher	67	0.15%	headteacher, headteachers
50	Mission	59	0.13%	mission

Given that the recruitment documentation were all for Headships, it was predictable that educational language would feature strongly: the most common term, by some margin, was ‘schools’ (2011 occurrences) and its various derivatives (school, schooling, etc.); the term ‘students’ appeared third most frequently (490 occurrences); Principal appeared eighth (267 occurrences); and curriculum twelfth (227 occurrences).

Unsurprisingly then, typical across the job advertisements/descriptions were requirements such as:

“An outstanding instructional leader, passionate about learning and teaching...”

(Recruitment Document 18)

“Leading, guiding, coaching and inspiring both the academic and administrative staff to contribute professional expertise towards the highest standard of curriculum and co-curricular delivery.” (Recruitment Document 4)

“Evidence of a passion for learning, a deep abiding respect for the profession of teaching, a genuine caring for students” (Recruitment Document 71)

As these text extracts and the word frequency analysis show, evident throughout the recruitment documentation was a focus on the requirements and principles of education. Articulated in the sample of recruitment documentation, the practices of school leadership seem to be, and arguably quite rightly so, focussed on pedagogy and on student well-being. This focus is, however, to be expected. If the job description for an architect did not include reference to the technical requirements of architecture, it would be more than a little unusual; the same could be said of school Headship.

Perhaps equally unsurprising, the fourth most frequent word in the recruitment documentation was 'managing' (427 occurrences); school Heads are, after all, *managers*. As such, many of these references directly related to school/educational administration:

“...maintain effective behaviour *management* and the health, safety, welfare of students...” (Recruitment Document 72; *emphasis added*)

“...*management* of the school’s boarding provision...”
(Recruitment Document 1; *emphasis added*)

Similar evidence of educational management/administrative practice was found in 214 specifically coded instances⁴⁷ across the recruitment documents. Heads need to be passionate about pedagogy but they also need to be able to manage the people and systems necessary to ensure that education is possible. However, this fact alone reveals very little. As supported by the works of Hallinger (1992), Eraut (1994), Leithwood and Riehl (2003) and Matthews and Crow (2003), and as suggested by the etymology of the job titles Head Teacher, Head Mistress, Head Master, and even Principal, the very nature of the role points towards *managing* the processes necessary to facilitate learning. Being the ‘Head’ of the ‘Teachers’ places one in charge of assisting, guiding and supporting those teachers in their educational duties. Thus, apropos the distinction drawn between management (as functional necessity) and managerialism (as a shifting of management purpose), it is important to consider whether this requirement for *management* extends to tasks that might be considered *managerial*.

⁴⁷ From 1,662 total phrases coded. It should be noted though that, as highlighted in Chapter 4, only strong exemplars were coded; in essence it can be read that all text was educationally aligned unless coded as such, with those incidences coded simply representing the best/strongest exemplars.

5.2.2 The Demand for Managerial Skills/Knowledge

As the literature review notes, evidence of managerial practice might include the requirement for Heads to adopt evidence-based management (Cunliffe, 2009), decision-making based on hard facts (Pfeffer and Sutton, 2006) and performativity (Ball, 2012b). Examples of such practices, represented by the comments below, were found in just over a quarter (27) of the recruitment documents:

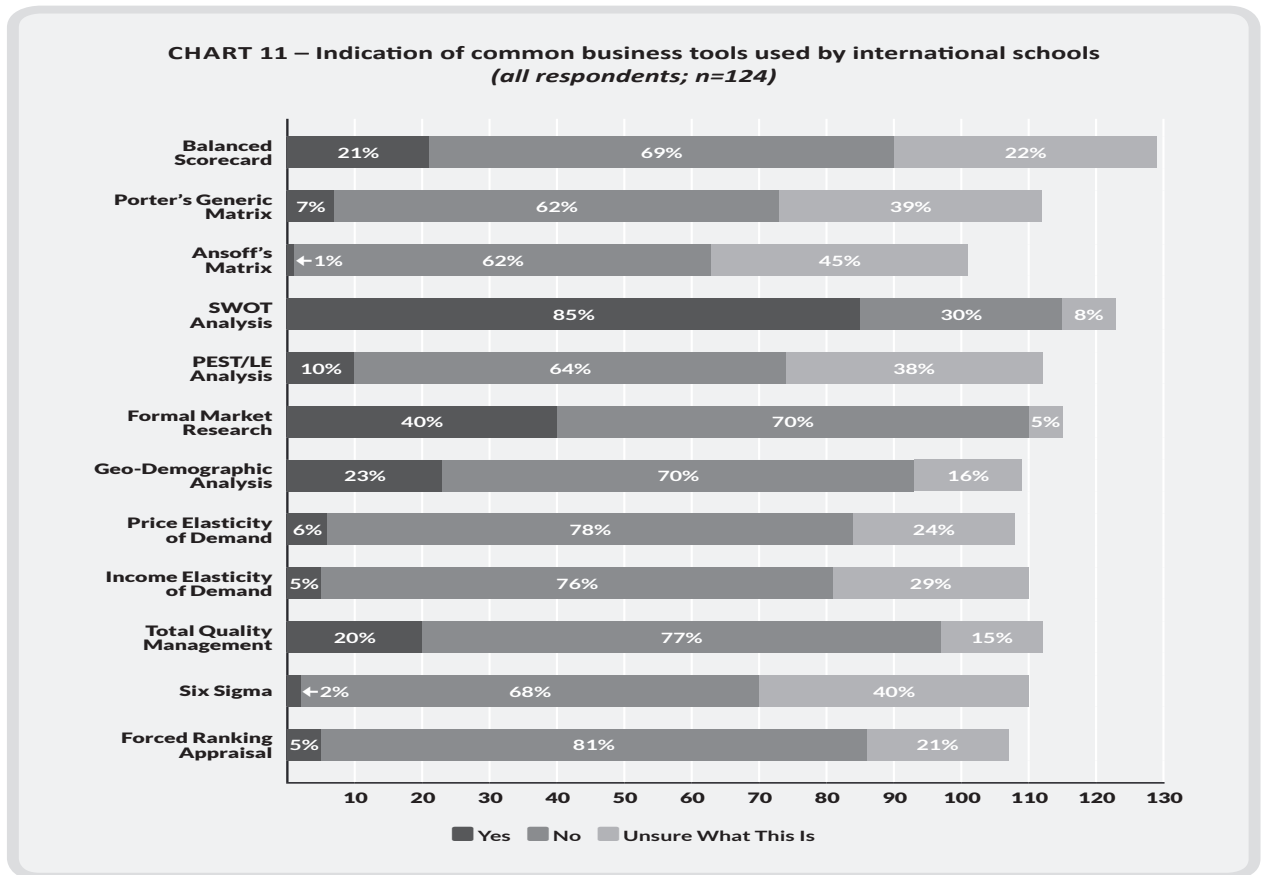
“...focus on students’ achievement, using *data* and *benchmarks* to monitor progress.”(Recruitment Document 17; *emphasis added*)

“...provide timely, robust and relevant *data* to support, manage and report on school and student performance” (Recruitment Document 13; *emphasis added*)

“Strategies to engage the whole school community in the systematic and rigorous self-evaluation, including the use of *data* to promote achievement and accountability for student learning”. (Recruitment Document 7; *emphasis added*)

Thus, while school leadership is clearly about management, with numerous references in the recruitment documentation to Heads being required to manage staff, students, facilities and resources, there is also evidence of a requirement for more managerially inclined practice.

However, contrasting this, data from the online questionnaire does not suggest that managerial practice extends to a requirement for technical/specific business knowledge:



Aside from SWOT Analysis, a tool arguably familiar even to GCSE Business students, it is apparent that few of the tools common in the commercial world⁴⁸ seem to have (yet) found regular use in international schools. Also revealing is that, with the exception of SWOT and formal market research, a significant proportion of Heads were unsure what many of the listed tools actually were. Here then we find limited evidence of actual *business*-like thinking. As argued, the association of managerialism with business-like practices is, perhaps, an overstatement. If NPM is indeed synonymous with business practice one might have expected to see greater use of tools common in business – that appears not to be the case, at least in this sample of schools.

⁴⁸ The specific tools included as response options to this particular question were derived from Cunliffe (2009) and from a survey of tools commonly found in Business and Management textbooks (see, for example Marcouse, 2003).

Moreover, the differences between types of ownership and responses to this question were marginal. Those working in *corporately* owned or *for-profit* schools were no more aware of these business tools than those working in not-for-profit schools. No one model or technique is used more substantially in one type of school than in any other. The exception, again, being SWOT Analysis, a tool used by a greater proportion of not-for-profits (81%) than for-profit (67%) or corporately owned schools (69%).

Evidently then, whilst according to the recruitment consultants “knowledge of the business aspects” (AD) of schooling is desirable, first and foremost international school Heads are required to have educational experience. As another recruitment consultant commented:

“[Schools] are still looking for a Head who has a traditional capacity for educational leadership; business literacy is important but very much secondary. We’re seeking the Holy Grail. Our clients want Heads who are great schoolteachers, great educationalists, but who also have CEO potential and business literacy. (AM)

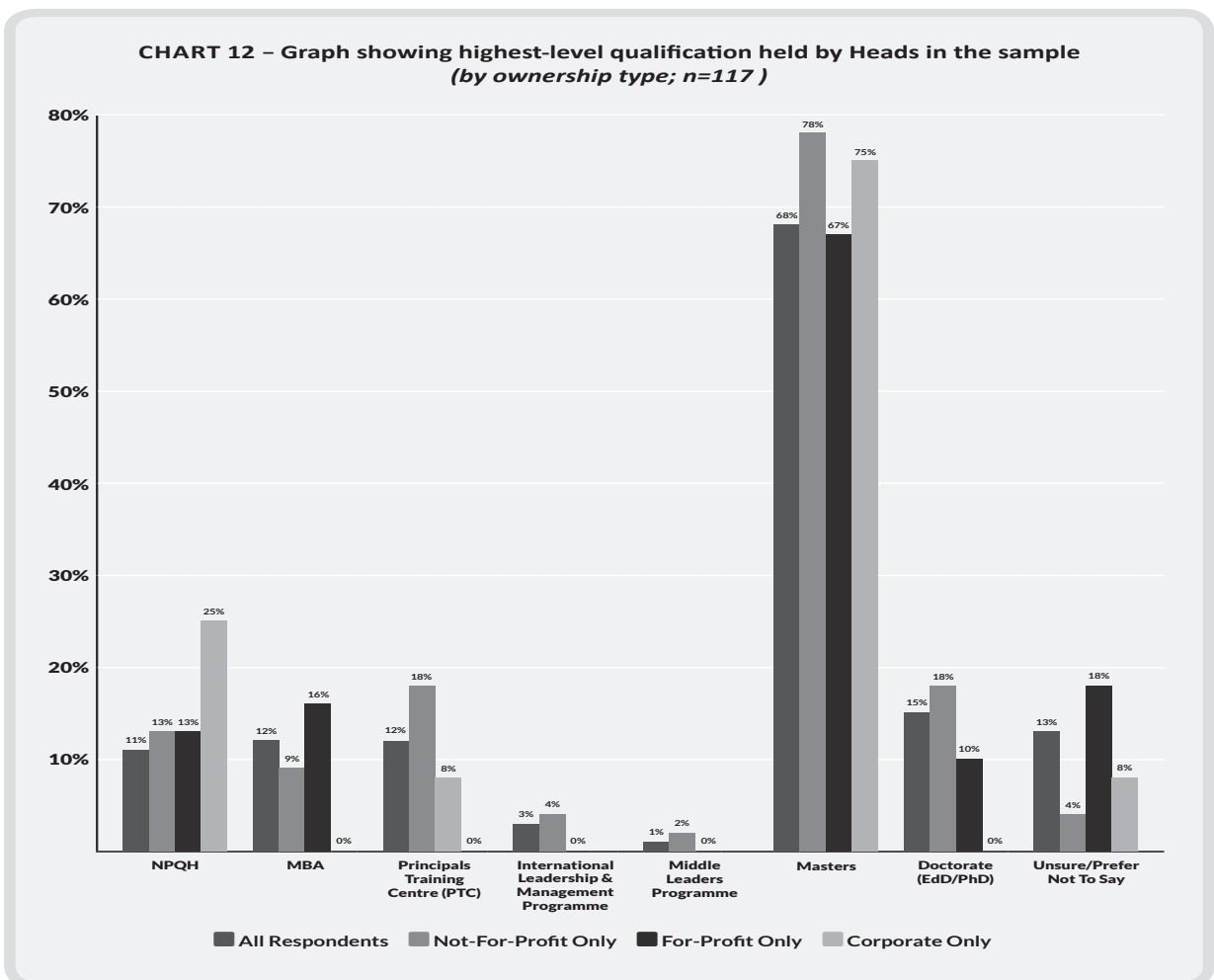
“Are there schools looking first and foremost for business leadership, for whom academics are secondary? In the international sector, no, broadly; not yet, at least.” (AM)

Given a market where 80% of schools are for-profit (ISC Research, 2016) the primacy given to educational expertise is significant. Indeed, reference to ‘profit’ occurred just once across all of the recruitment documentation. There was also very little explicit mention of ‘business’; the term appeared 41 times but on the vast majority of occasions this was in reference to liaison with the school’s Business Manager, to the local business community or to the subject Business Studies. In their public presentations (notably, profit status is also rarely declared on school websites)

schools (and the leaders within) are clearly trying to promote a particular version of their *raison d'etre* – a version deliberately framed within the discourses of education, and not those of commerce.

5.2.3 Qualification Requirements

Investigating whether, as Hoyle and Wallace (2005) suggest, managerialism is evidenced through credentialism (Hoyle and Wallace noted, for example, that the National Professional Qualification for Headship is becoming an increasing necessity for appointment as a Head in the UK), questionnaire respondents were asked to report on the qualifications held by Heads and senior managers:



What this data suggests is that in order to secure Headship, a Masters level qualification, at minimum, is advantageous (68% of questionnaire respondents indicating a Masters would be required for appointment as a Head). This finding was confirmed by the recruitment consultants:

“It’s essential these days that anybody over the age of 45 can demonstrate active professional development, plus a relevant Masters or higher degree...” (AM)

Notably however, and supporting the observations above re the lack of *specific* business knowledge required, this credentialism has not yet made itself felt in terms of particular business qualifications. The Masters of Business Administration (MBA) is, for example, held in broadly similar proportions to the more educationally orientated National Professional Qualification for Headship (NPQH) and Principal Training Centre (PTC) qualifications. In consequence, although there *is* evidence of credentialism, these credentials are for the moment those of education, not of business – in other words Heads need to prove (through academic qualification) their knowledge of pedagogy but not, or at least not yet, their understanding of profit.

However, contrary to this, the recruitment consultants offered a different view:

“[My clients] take a pretty typical sort of view that there’s nothing wrong with PGCE’s or MA’s, but my preference is for candidates who have done appropriate MBA’s.” (AM)

Offering a similar view, AD noted:

“...a lot of leadership courses don’t cover business; perhaps they should. Maybe it isn’t enough to just do an MA in Leadership and Management which focuses on the type of leader that you are, how you are going to bring people together and getting the best out of them, rather than, you know, running a multimillion-pound school with profit targets, and how to do that. Maybe, there should be more courses on that, so I think that if the trend continues for for-profit schools, and you want to get ahead, you’ve got to be business savvy” (AD)

The recruitment consultants also talked about the need for Heads to have “business acumen” (AW) and “business literacy” (AD). This was particularly true of AM who, running an agency that specialises in very senior Headships, suggested that:

“I can hardly envisage a Head being recruited these days who is not business literate; that means that they are aware of the importance of Profit and Loss accounts and that they have some idea of the main economic drivers, so yes, certainly there is a recognition of the business literacy. The weighting of this varies from client to client, but it will always be there.”

(AM)

This sentiment was echoed by AW:

“I think, in my experience, particularly in the last few years, Heads are increasingly expected to be business people, as well as academic people.” (AW)

Tellingly, and suggesting that the reality of Headship may be even more pronounced than the rhetoric of recruitment documentation, the recruiters were aware that business requirements do not always appear in job descriptions:

“I’ve heard of Heads being told at interviews that they would have business targets to meet based on the number of children, profit margins etc., but I’ve never, ever seen it on the job description; I’ve never seen it written down in a job advertisement.” (AD)

It is clear then, at least as far as the recruiters are concerned, that business *awareness* is important. It would be remiss, however, not to acknowledge that the recruiters are dealing with prestigious institutions recruiting for very senior posts; their views should, perhaps then, be taken as indicative of the needs of this upper tier rather than of the market as a whole. On balance though, whereas the consultants seem to consider business qualifications advantageous, the recruitment documentation required nonesuch.

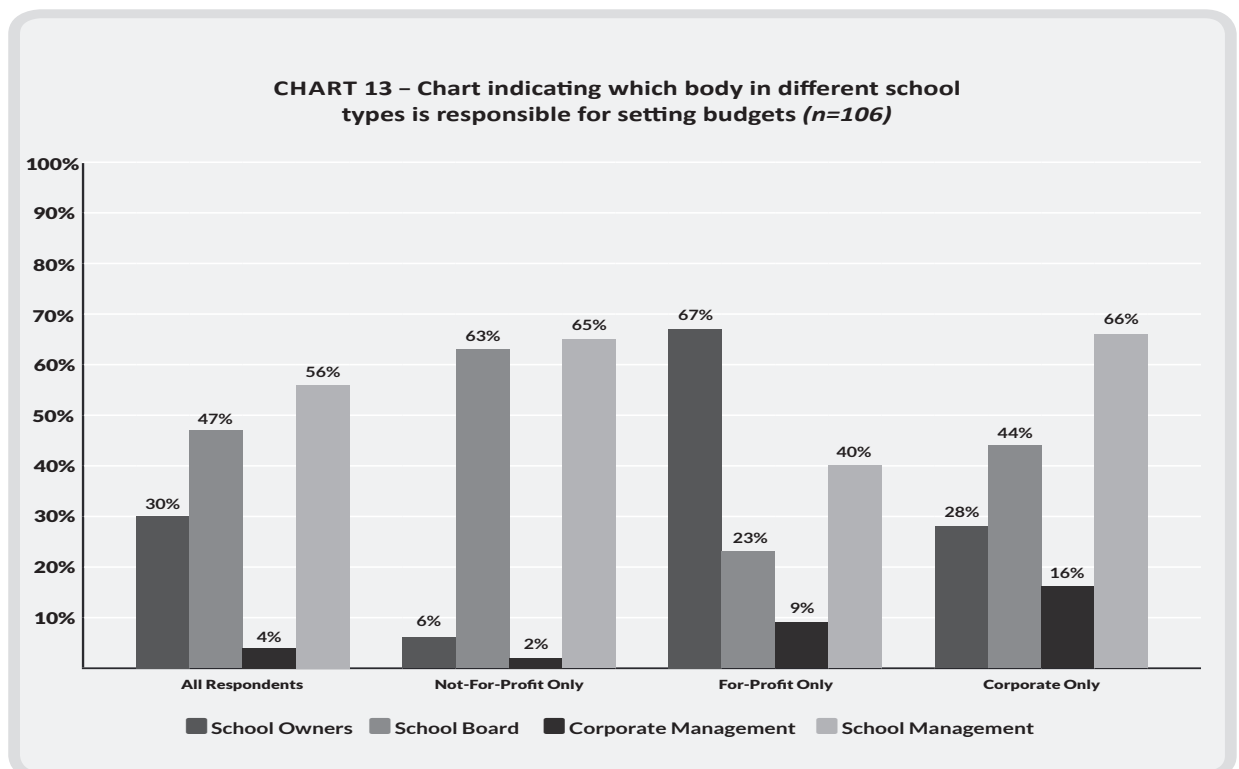
5.2.4 Financial and Marketing Skills

5.2.4.1 Financial Skills

With regard to the suggestion that education is increasingly driven by the need for financial return (Stevenson and Wood, 2014), it was highlighted by one of the recruitment consultants that:

“...[Heads] don’t need to be a [financial] expert but they do have to have a certain level of understanding. In my previous job [as a Head], I went to meetings every month and was given financial reports, and I must admit, on a lot of it, I didn’t understand what the hell I was reading (laughs), and I wish I had, because it could have lent some serious weight to some of the arguments I had to make to the Board when it came to saving the pre-school. For example; the resource argument was the key argument there. I think for Heads in for-profit organisations, it’s got to be an important skill”. (AW)

Investigation of this kind of focus on economy of resource (Hood, 1991) was further considered in a range of questions related to budgets and finance in the online questionnaire:



Most notable, within this data is the visible difference between ownership types; differences which point to subtle (and depending on context perhaps even significant) variances in practice. In the not-for-profits, the school Board and school management are responsible for setting budgets, similarly in the corporates. In the for-profits, it is predominantly school owners who determine, monitor and control budgets. While the practical implications of these differences cannot be generalised, given that Heads in corporate and not-for-profit schools have more responsibility for setting budgets, one might expect that Heads in these types of schools need to be more financially aware than their for-profit peers – financial practices are, after all, a more significant part of their responsibilities.

That said, there are, of course, also issues of power and control here. In those for-profit schools where the school owners oversee budgets, there is the potential for the Head to feel disenfranchised and disempowered. There is also the potential that owners' decisions about budgetary priorities might undermine the Head's priorities – a possible flashpoint for conflict. Although less frequently responsible for setting budgets, Heads in for-profit schools might then, as AW points out (above), wish to become (and might benefit from becoming) more financially adept. Indeed, as the comment by one Head that "you've got to talk to these people in their own language" (Interviewee C6) suggests, Heads want to be able to counter, resist or balance the power of school owners. If they are to contribute with authority and credibility to financial conversations, Heads must be able to speak to owners in terms they understand – they must speak with both educational and financial legitimacy.

So, on the one hand, across the ownership types, there is a need for Heads to have financial knowledge and skill. There *is* evidence of a form of professionalism infused with managerialism. However, on the other hand, there remains a lack of specificity about which financial skills might actually be important. The terms 'Profit and Loss', 'Balance Sheet' and 'Cashflow' are, for

example, entirely absent from the recruitment documentation. Even the word 'finance' appeared on only 15% of the documents, and then framed in general terms:

“...the ability to understand the financial side of the school”

(Recruitment Document 2)

“Overseeing the financial soundness of the school” (Recruitment

Document 74)

As with more general business tools, it seems that talk of financial *awareness* (and being able to talk generally about finance) is more prevalent than any *specific* requirement for financial knowledge. There is a discourse of financial understanding that surrounds Headship, but it does not seem to penetrate (at least not deeply) at the level of practice. This is not to say that Heads shouldn't understand finances and that it is not to their advantage to do so, rather it is to highlight that this talk may exist not because of functional need but because of relationships of power. There may be limited technical need for Heads to be anything more than financially aware, but this awareness (or outward performance of awareness) gives Heads credibility and power, and has the potential to be an important site of identity work.

5.2.4.2 Marketing Skills

Nearly half of all of the recruitment documentation (46%) required some form of marketing skill:

“Effectively *market* the school to the local and wider communities with the aim of recruiting new students and retaining existing students to achieve a full roll and achieve

agreed budgeted student numbers” (Recruitment Document 48; *emphasis added*).

“The Head is expected to drive the *marketing and admissions* process to ensure that pupil numbers are at maximum capacity” (Recruitment Document 18; *emphasis added*).

With these comments typical of others found across the documentation, it is evident that many school Boards are keen to establish marketing as an important dimension of Headship, an observation with which the recruitment consultants concurred:

“The Head has to be an active proponent of marketing strategy. That’s not to say that a school won’t have a Marketing Director but the word that we use to describe the role of the Head re marketing is that he or she is the spearhead”. (AM)

“[Heads] are expected to have skills in marketing; because their schools are often in very competitive environments, competing over [sic] students. They are expected to have marketing skills, be able to advertise their school in a way that will attract parents and be able to go around and present in different forms and talk to various business organisations to try and bring the students into the school”. (AW)

While as one of the Heads interviewed forcefully noted, “marketing [isn’t] something new; I was a Head in the UK in the 80’s and 90’s, I worked harder at marketing there than I ever have internationally” (Interviewee C6), marketing was also a theme of many of the face-to-face interviews with Heads themselves:

“I’m more aware now of things like marketing and PR. I think I’ve realised that academics is just one part of the job” (Interviewee C22)

“...some days you can spend 9:00 till 10:00 with your the heart and mind in the classroom, and then from 10:00 to 11:00 you’re having a marketing conversation with the Head of Admissions about the latest marketing strategy” (Interviewee C1)

Thus, while marketing was not a feature in all of the recruitment documents, appearing in just under half of the sample, the overall picture (across the various data sources) does point towards marketing practices being part of the role of school Heads. This argument is reinforced when one considers that ‘children’ (75) was mentioned fewer times in the word frequency analysis than ‘marketing’ and ‘promotion’ (82 incidences combined).

Yet again though, as with qualifications, business acumen and financial skill, what these marketing requirements actually are is non-specific. There is a degree more precision in the demands *vis-à-vis* finance (perhaps bespeaking the less technical nature of marketing) but the recruitment documentation falls short of specifying marketing tasks, merely requiring marketing *knowledge*, requiring the Head be a marketing *figurehead* or requiring the Head to oversee Admissions. In contrast, educational requirements were often much more exacting; detailed

knowledge of a particular curriculum, the ability to speak a specific second language, or experience of a distinct country-centric education system being common requirements.

5.3 DISCUSSIONS

Pending more formal conclusions (Chapter 6), the analysis above has shown that any claims of managerial practice within international schools being a strong antecedent to managerial identifications is contestable. The data presents a rich but mixed and equivocal perspective.

On the one hand, specific business skills, knowledge and practices were not as common in the online questionnaire or recruitment documentation as more educational ones. Heads are required to be *managers*, and there is evidence of Lyotardian performative pressure, but the field is not unequivocally *business-like*. The requirement for business skills were always framed in the general – “acumen”, “awareness” and “savvy” being the words used by the recruitment consultants. Correspondingly, while 78% of Heads hold at least a Master’s degree (with the recruitment consultants asserting that a Master’s degree is a prerequisite for Headship), MBA’s were no more popular than vocationally and educationally orientated qualifications such as the NPQH or PTC. The profession may be credentialist (Hoyle and Wallace, 2005) but that does not extend to requirements for, or the privileging of, business qualifications; Heads may need to understand business (in a loose sense) but the specific requirements of Headship remain aligned to educational skills and practices.

On the other hand, the data does reveal the potential for Heads to be disciplined by *managerialism*. There may be limited commercial pressure (only 18% of the sample have profit targets) but requirements for Heads to be “...pace-setter[s] who determine the agenda in pursuit

of excellence” (Recruitment Document 91) does evidence managerialism as a feature of international school life. For example, paralleling Foucault’s ‘technologies of statistics’ (1970, 1972) and the potential realignment of ‘pedagogical and scholarly activities towards those [most] likely to have a positive impact on measurable performance’ (Ball, 2012b:20), the widespread use of parent surveys (76% of all respondents), especially as compared to the use of student and teacher surveys (57% and 54% respectively), suggests that international schools are ‘marketised’ (Coleman and Early, 2005).

In other examples, the prevalence of two-year fixed-term contracts also seems, as the literature predicts (Gewirtz *et al.*, 1995; Ball, 2008), to indicate managerialism. Significantly, average contract length (2 years) contrasts with average tenure (3-6 years). This begs the question why schools do not offer longer initial contracts or longer contracts on renewal. The answer is, arguably, that shorter contracts affirm managerial power. Underperforming staff are more easily removed where contract terms are shorter; moreover, the biennial or, in some cases, annual, threat of non-renewal helps to keep the rank-and-file in line. In this regard, there is evidence of a deeply-embedded and highly normalised practice, one which infuses international schools with a particular form of managerialism.

Furthermore, the more performative practice of PRP may not yet be common, but Ball’s (2012) observation that managerialism is experienced by school leaders through performance management does seem to apply to international schools - 86% of the sample have in place some form of performance management system. In addition, Heads must “willingly” partake in the appraisal process. They must freely and without resistance submit themselves to the performative gaze – they are required to internalise the values of performativity (Lyotard, again).

Heads must, in other words, (at least give the appearance) of having allowed managerialism to find its way 'in here' (Peck, 2003; in Ball, 2012a) – an assertion which is explored further in the reporting of the qualitative interviews (see below).

In summary, the professional undertaking and daily tasks of Headship have not, it seems, been subsumed by *business practice*, at least as presented in the online questionnaire and in the recruitment documentation. There is, nevertheless, evidence that Heads must, to some degree, engage with *managerial practice* - and, therefore, that they must accommodate or moderate these managerial requirements for their schools and, primarily for this study, also for their *selves*.

5.4 RESEARCH QUESTION II (RQII)

The focus of this section is on the discursive processes through which the professional educational subject is created and empowered. Under analysis here is which discourses, specifically educational and/or managerial, may most significantly influence the governance of international school Heads as subjects.

In terms of method, this section includes elements from each research component: (Part A) the online questionnaire, (Part B) the recruitment documentation analysis and recruitment consultant interviews, and (Part C) the interviews with international school Heads. Data selection is on the basis of evidence of discourse and its implications. Through the analytic of Lawrence and Suddaby's (2006) taxonomy, reference is also made to relationships between institutional work and identity work.

5.4.1 The 'Student First' Discourse

If, as an SCA methodology predicts, repetition is an indicator of the discourses on which texts draw, it is clear that international school Headship is prominently constructed by and through the discourses of education.

Across each data source (questionnaire, recruitment documentation and interviews), the most prominent linguistic reference points were educational. For example, in the recruitment documentation the term 'student' (and derivatives) appeared on 490 occasions, nearly 5 times per document. In the interviews with Heads, there were 285 coded instances of specific

educational focus and 356 references (in some form or other) to education⁴⁹, more than any other coded data. The rhetoric that “students must come first” (Interviewee C21) was particularly common:

“...it goes right down to the child; that’s got to be the core of everything we do...it’s not tins of beans, it’s children”
(Interviewee C11)

As the literatures predict, even while performing a role that may see them rarely in contact with students, the discourses of education require that Heads maintain a ‘student first’ identification. One Interviewee, in a turn of phrase indicative of Lawrence and Suddaby’s (2006) *demonising* institutional work, even went so far as to accuse Heads working in corporate contexts (where, in her opinion the profit motive detracts from the purity of child-focused education) as having “sold their souls to the Devil” (Interviewee C7). Contemporary Headship may require plural (if non-specific) skills but as advocated by Hodgson (2005), so strong it seems is the ontological appeal of educational discourse and so intrinsic its demands (and rewards), that the professional is intensely seduced by and subjugated to educational power. A Head may know that their role is less ‘about the student’ than they claim, but, for fear of being professionally ostracised, they are highly unlikely to admit it.

Also echoing Lawrence and Suddaby (here in relation to *disassociating moral foundations*), these student-centric discourses also work as a specific counter to the demands of managerialism:

⁴⁹ As previously noted such was the predominance of educational rhetoric that only strong exemplars were coded; these 641 instances are, therefore, indicative of a broad educational tone to the documents.

“Schools run on emotion. Some of the things I say to my business dominated board, they go, ‘What?’ I say, ‘Well, it’s a school, that’s the way we do things’. It has to be about the children” (Interviewee C15)

Managerial discourse is, however, not easily side-lined. A critical perspective requires that these claims of educational priority be problematised.

5.4.2 The Discourses of Managerialism

Revealingly, within the recruitment documentation, the second most frequent word after ‘schools’ was ‘develops’ (550 occurrences). While this cannot be read as direct evidence of managerialism, it does cast the role of Heads firmly within its influences. Indeed, unpicking the taken-for-granted assumptions behind this phrase, found in the documentation is evidence of managerialism hidden within the Trojan Horse of educational purpose:

“...strong commitment to securing *outstanding progress* for every child...” (Recruitment Document 19; *emphasis added*)

“...reports on the students’ academic *progress* as measured by standardised tests...” (Recruitment Document 21; *emphasis added*)

“...data and benchmarks to monitor *progress*...” (Recruitment Document 89; *emphasis added*)

With ‘progress’ required to be ‘sustained’ (27 occurrences) and ‘outstanding’ (77 occurrences) there is a general suggestion of the kind of demands for *perpetual* performance improvement Ball has noted in UK state education (1997, 2004, 2006). While the linguistic claim of these phrases may be educational, it is arguable that, as in the UK, they have been formed through managerialism.

In one recruitment document, the managerial influence was particularly prominent:

“Defines ambitious goals and establishes priorities with clear responsibility to drive results; manages projects, activities, and resources effectively. Translates school goals into well-defined performance plans for the organisation. Designs and manages performance management processes that deliver results far exceeding expectations” (Recruitment Document 7)

Amidst the business speak and hyperbole of this statement, the adjectives ‘drive’ and ‘ambitious’ are strong examples of an underlying performative discourse (in the Lyotardian sense); as are the phrases ‘performance plans’ and ‘exceeding expectations’. Comparable terms in other documents suggest similarly constitutive affects:

“The [name] is an *ambitious* school – we strive to respond to educational change and to adjust and adapt to meet our *clients’* needs” (Recruitment Document 26; *emphasis added*)

“Monitor evaluate and review classroom practice and promote *improvement strategies* to ensure that *underperformance is challenged* and *effective corrective action* and follow up undertaken” (Recruitment Document 1; *emphasis added*)

“To ensure a consistent and continuous school-wide focus on pupils’ achievement, *using data and benchmarks* to monitor progress in every child’s learning”. (Recruitment Document 93; *emphasis added*)

Twisting managerialism into educational form, these are powerful (and as will be discussed with regard to Research Question III, powerfully seductive) statements. Framing the purpose of “corrective action” and the use of “data and benchmarks” as a focus on “every child’s learning” makes managerialism difficult to resist. Who would not wish to focus on pupils’ achievements? Who would not wish to challenge underperformance? By no means is the argument that these are ignoble aims, indeed, quite the contrary. However, of concern here is not the (potential) impact on the student but the impact on school leaders. By invoking the aims of education these discourses have greater potential to get ‘in here’ (Peck, 2003; in Ball, 2012a) – an important observation in relation to identity work.

Despite the dominance and power of educational discourse, there is evidence then that Heads are the subjects of alternate discourses, especially managerialism. The following comments are illustrative of that potential:

“...we try to be price competitive, that’s an important thing. We have to sell the academics of the school, the quality of what we offer” (Interviewee C11)

“It’s very competitive, and we work incredibly hard – I mean really hard – to compete. We have to offer something different. In Boarding that means the level of pastoral care. When you get to the size of [competitor school name] you just can’t offer that level of support, so that’s what we sell – the personal approach” (Interviewee C13)

“...We look carefully at tuition fee increases, and how to apply them against what we offer parents. We know what we need to deliver, we have done our research, we know what the market wants.” (Interviewee C19)

In discourse terms, these comments are evidence of the predicted neoliberal ‘colonisation’ of education by managerialism (Fairclough 1989, 1995); the constitutive effects of managerialism *alongside* (particularly, in this context, not *instead* of) traditional values and beliefs. It can be seen that the manager-subject formed by these discourses is, in part, constructed around beliefs re the value of market forces, competition, structural efficiencies and the importance of performance. Educational beliefs may be the native discourse but so professionally normalised are the colonising influences of managerialism that even Interviewee C7’s “selling your soul to the devil” stance was later softened:

“We must have management thinking in schools, let’s be clear about that. I’m not anti-management ...” (Interviewee C7)

What Interviewee C7’s positioning highlights is how difficult it is in the current neoliberal environment for a professional educator to be entirely immune from the effects of managerialism – no matter what one’s personal views on the matter. This claim is further supported when one considers how internalised managerialism seems to have become for some Heads. In the face-to-face interviews, Interviewee C8, for instance, even while asserting the educational priorities of Headship, was not immune to conflating education and business:

“Heads should be involved very heavily in the academics, teaching and learning because that is the *core business*; all discussions must begin with education but, bottom-line is we are a business” (*Interviewee C8; emphasis added*)

It is not the fact that Interviewee C8’s school *is* a business that is important, rather it is his use of the term “core business” to frame the centrality of education (and the importance of the Head). This term, and his reference to the “bottom-line”, shows how discourse has constructed Headship managerially. Education and business have become intertwined; both accepted as part of the role.

This conflation of the discourses was further illustrated in comments by Interviewee C19:

“...I would never speak to the staff about being a business, but I do remind them of our external responsibilities. Word of mouth is by far the best of marketing we have. I remind staff about appearance, about presentation, and about the quality of their marking - this stuff matters, especially to parents.”

(Interviewee C19)

On the one hand, the reluctance of Interviewee C19 to refer to his school as a business reveals how contested such thinking is amongst educational professionals. On the other hand, in the implicit reference to marketisation, there is also evidence that he is subject to managerialism; and that, in his attempt to *change normative associations* (Lawrence and Suddaby again), that he gains occupational benefit over staff through its precepts.

In other cases, the term ‘client’ is for some Heads now an accepted (or partly *acceptable*) part of Headship:

“...in my eyes I have to alert teachers that these are *clients* and that we have to make some adjustments to satisfy them.”

(Interviewee C1; *emphasis added*)

“Client is not the language of education. Has that become the language of the Head? It is for me when I am talking about parents. I generally will never use that with students, but parents are the ones who write the cheques and pay the bills, so yea...they are clients” (Interviewee C11)

While only one of the participants (Interviewee C19) went so far as to describe education as a 'product' (though he did add that he "hated using that term"), it is clear that managerialism is having determining influences on international school Headship. Interviewee C24 even described the role of Heads as "managing the business side of things"; willing to leave "education to others" he defined all schools (even not-for-profits) as businesses and claimed that "you gotta (sic) have a Head who knows business, else all schools would be bankrupt".

5.4.3 The Discourses of Professionalism

Use of the word 'professional' (or derivatives such as 'professionalism') is found across the recruitment documentation (184 occasions – almost twice per document). While the term is used almost exclusively in relation to education (referring, for example, to 'professional development' and 'professional learning communities') the popularity of the term suggests deliberate, if potentially subliminal, motivations – it suggests the workings of discourse.

When, for instance, crafting recruitment documentation school Boards will have in mind a particular view of professionalism, drawing on language, and thus discourse, to frame that view in the recruitment documentation. Here it is clear that the view of professional is one of the Head as *educational expert*:

“[The Head will] provide professional instructional leadership and modelling...that establishes the school as a centre of educational excellence” (*Recruitment Document 50*)

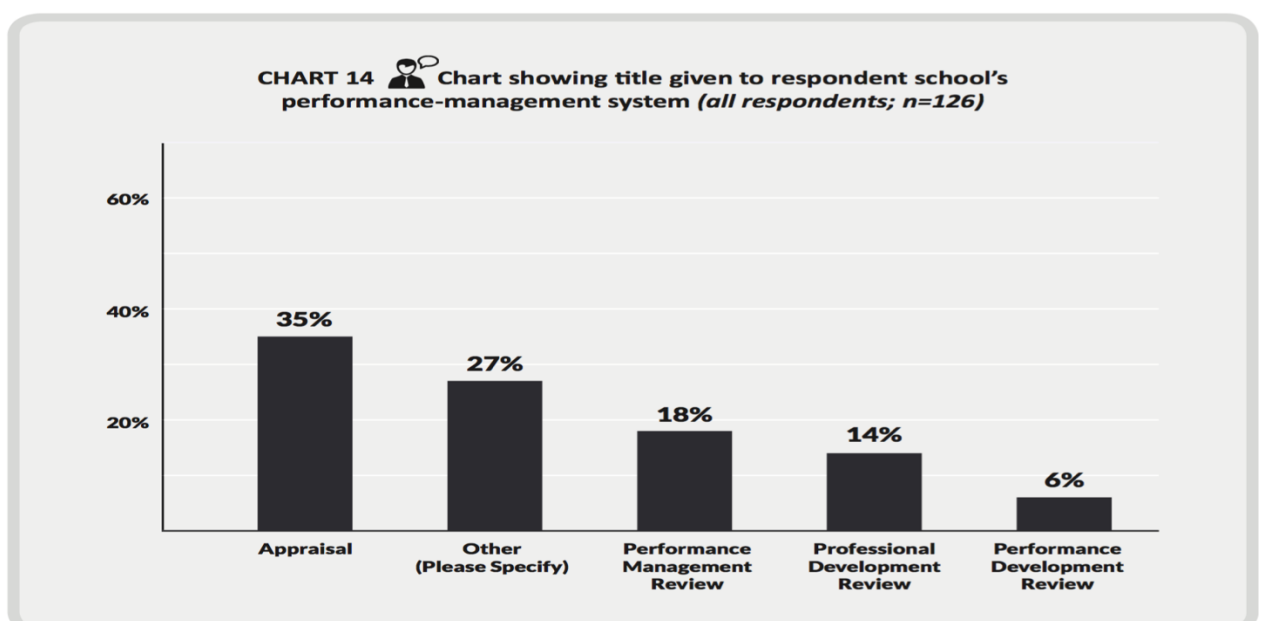
Equally, when considering an application to a particular Headship, candidates are likely to draw on their own preconceptions of what being 'professional' means and against their perceptions of the type of professional the school in question might require. In the extract above, the phrase 'modelling' suggests a Head who is an expert pedagogue who undertakes some teaching responsibilities. Potential applicants will then reflect these images of professionalism against their own (current and desired) self-image, deciding whether to apply or not. Invoking the term 'professional' within job descriptions and job advertisements leverages, therefore, discourse for both candidate and recruiter alike; the discourse/s of 'professional' (and whatever that means for each person involved) become a lens through which candidates judge themselves and through which they are judged by recruitment panels.

Given this assertion, it is perhaps surprising that more schools do not mention a requirement for candidates to hold formal *professional* qualifications. The NPQH was mentioned only six times in the recruitment documentation and the PTC qualification not at all. Similarly, in the online questionnaire far fewer Heads held the NPQH (11%) or the PTC (12%) than more generic Master's degrees (68%). Considering why this may be the case, given the diverse body from which international schools recruit and the contested nature of educational professionalism (Zembylas, 2003; Beijaard, Meijer and Verloop, 2003), feasibly there is concern that narrowing the definition of professional to that of a parochial qualification may restrict the field of candidates. Recruiters, arguably, want to invoke the discursive power of 'professional' but they also want to leave room for interpretation; room for some agency over what 'professional' actually means. By not specifying (through qualification or skill requirements) the exact type of professional required, accommodation is made for professionalism to incorporate alternate, multiple and fluid discourses; professionalism can be interpreted (by Board and candidate) *both* educationally *and* managerially and to varying degrees in different contexts.

These arguments are not in themselves evidence of managerialism; they do though reiterate the lack of specificity in terms of what is *technically* required of Heads. As above (5.2.4) where it was found that the requirements for ‘business acumen’ are, at best, vague, similar ambiguity is found with regard to professionalism. Notwithstanding an overall educational bias in recourse to ‘professional’ status, the exact type of professional required is relatively unspecified. Accordingly, performatively constructed (in the Butlerian sense) by recruitment panels and by Heads, what professional means is ever in flux; that flux providing the space for new interpretations of professionalism. So, for example, an individual might legitimately perform Headship as an educationalist, as a managerialist or as some combination of both – because the discourses on which professionalism draws are ill-defined, the amorphous nature of what it means to be a professional creates the space for discourse to produce hybrid subjects.

5.4.4 The Discourses of Performance

Extending the analysis of discourse further, participants were asked to indicate what title was given to performance management/appraisal processes; the rationale being that applying a CDA lens to the terminology used might reveal the underlying influences of discourse.



If one takes 'appraisal' to be a relatively neutral term⁵⁰ with, as Ball's descriptions of *performance* technologies suggest (Ball, 2012b), use of 'performance' drawing more strongly on managerialism – and certainly on Lyotard's (1979) version of performativity - notable here is that only 18% of schools sampled used the title 'Performance Management Review' and only 6% 'Performance Development Review'. In contrast 35% of the sample used the term 'Appraisal'. As with managerial *practice* (see above), the effects of managerialism on appraisal (as discourse) seem limited.

Nevertheless, a further 14% of respondents (18 schools) indicated adoption of 'Professional Development Review', a semantic twist that can be seen in two lights. On the one hand, there is an argument that 'professional' is a word with strong and meaningful foundations within educational discourse. In these terms, its use might be read as suggestive of softer purpose and more benign processes. On the other hand, an alternative view would hold that 'professional' is itself a loaded term. Whereas teachers may contest notions of 'performance', the requirement to submit to 'professional' audit is much harder to resist. Potentially this makes use of the term 'professional' much more insidious and much more in keeping with managerialism – it governs educational subjectivities around a legitimisation of Lyotardian performativity. Thus, it is possible to argue that in reality 'Performance Management Review', 'Performance Development Review' and 'Professional Development Review' (38% of responses combined) all sit in tension with the more benign 'appraisal' (35%).

⁵⁰ The etymology of *appraisal* is actually 'praise' and can be traced back to the Latin root: *pretiare* ("to reward"). According to the Oxford English Dictionary sometime between 1590 and 1724 the term switched to become 'appraise'; its first recorded use in appraising an employee coming in 1955 (OED, 1989). The meaning of appraisal is, therefore, different to current neoliberal obsessions with *performance* management – a linguistic turn more representative of managerial thinking.

Also interesting are some of the titles included within the 27% of 'Other' responses:

<i>Performance Evaluation</i>	<i>Faculty Evaluation</i>	<i>Leadership Feedback Survey</i>
<i>Performance Appraisal</i>	<i>Professional and Personal Growth Review</i>	<i>Professional Performance for Growth</i>
<i>Professional Performance Review</i> <i>(in comments: for 'teacher recalibration')</i>	<i>Teacher Performance and Evaluation</i>	<i>Professional Performance for Growth Evaluation</i>
<i>Self-Reflection and Development</i>	<i>Appraisal for Growth</i>	<i>Growth Setting Review</i>
<i>Salary Review</i>	<i>Professional Performance Review</i>	<i>Annual Staff Evaluation</i>

Amidst the blended terminology ('Performance Appraisal' for example – a combination that might be read as an attempt to sharpen the softer use of 'Appraisal'), the obviously managerial (the purpose of a 'Salary Review' is undeniably clear!), and the downright Taylorist ('teacher recalibration'), frequent use of the term 'growth' is worthy of further comment.

While performance management has been shown to be beneficial for new teachers, or those with specific difficulties, literature suggests it has limited value for the majority of teachers, and may in fact be incongruous with the concept of schools as learning organisations (Hannay, 2003). Moreover, performance management, detractors suggest, shifts the audit focus away from what gets *learnt* to the narrow confines of what gets *measured (ibid)*. Thus, in response, some schools have begun to move towards 'Professional Growth'; a shift in linguistic emphasis that promises a positive transferal in the accountability for teacher effectiveness away from the panoptical gaze of management towards teachers themselves being in greater control of their growth and development (Clarke and Hollinsworth, 2002). Under professional growth, teachers are expected to self-review, to identify their own development needs and to seek professional development

opportunities accordingly. In theory, 'Professional Growth' should be welcomed and embraced, offering the potential to free teachers from the shackles and rigors of more direct managerially-enforced Lyotardian performativity. Deeper analysis problematises this argument.

It is possible to reason that models of professional growth are an exemplar of managerialism becoming discursively embedded within international schools, encouraging those within to self-audit, self-discipline and self-control. In the self-regulatory regime that Professional Growth promotes, individuals are rendered as 'calculable and confessional selves who collude in their own subordination' (Collinson, 2003:535). Through 'professional growth' teachers are encouraged to turn the panoptical gaze on themselves – making that gaze truly inescapable: the audit never ends, the Self is never off-duty, the lens never closed. This is neoliberal thinking writ large. The audit process truly is 'in here' (*loc. cit.*); it is designed as such. Inherent in 'professional growth' are managerial assertions that, to achieve the common good, individuals must *themselves* grow and that they must do so in particular ways; if they do not, through the processes of *professional growth*, they must confess and repent⁵¹. Here then is managerialism at its most insidious. In an attempt to move away from manager-led audit, i.e. *performance* management, schools are reaching for a solution that, in reality, only affirms managerialisms hold. Across the sample there may be a balance between schools using the more neutral 'Appraisal' and those using more performance orientated language, but the emergence of 'Professional Growth' tells its own story – one that speaks of how deeply the ideas and influences of managerialism runs and of why individuals subject themselves to managerial power freely and willingly.

⁵¹ It is somewhat ironic in light of discussions re Professional Growth that fewer than half (42%) of respondents claimed that their performance management system was closely linked to Professional Development – schools want teachers to grow (however that is defined) but they don't yet all have the systems to *support* that growth.

This is not to suggest that professional growth and performance review (or their outcomes) are inherently negative, rather that the assumptions behind them are rarely unpicked. While international school professionals (Heads included) are, to some degree, the subjects of managerialism - to models of professionalism, as far as appraisal is concerned, based on Lyotardian performativity - for the skilled professional those subjectivities also offer professional reward, enhanced self-esteem and legitimacy. As RQIII will address, individuals able to perform as demanded by educational *and* managerial discourse are those whose professional identities enjoy the (albeit fluid and transient) additive effects of professional success.

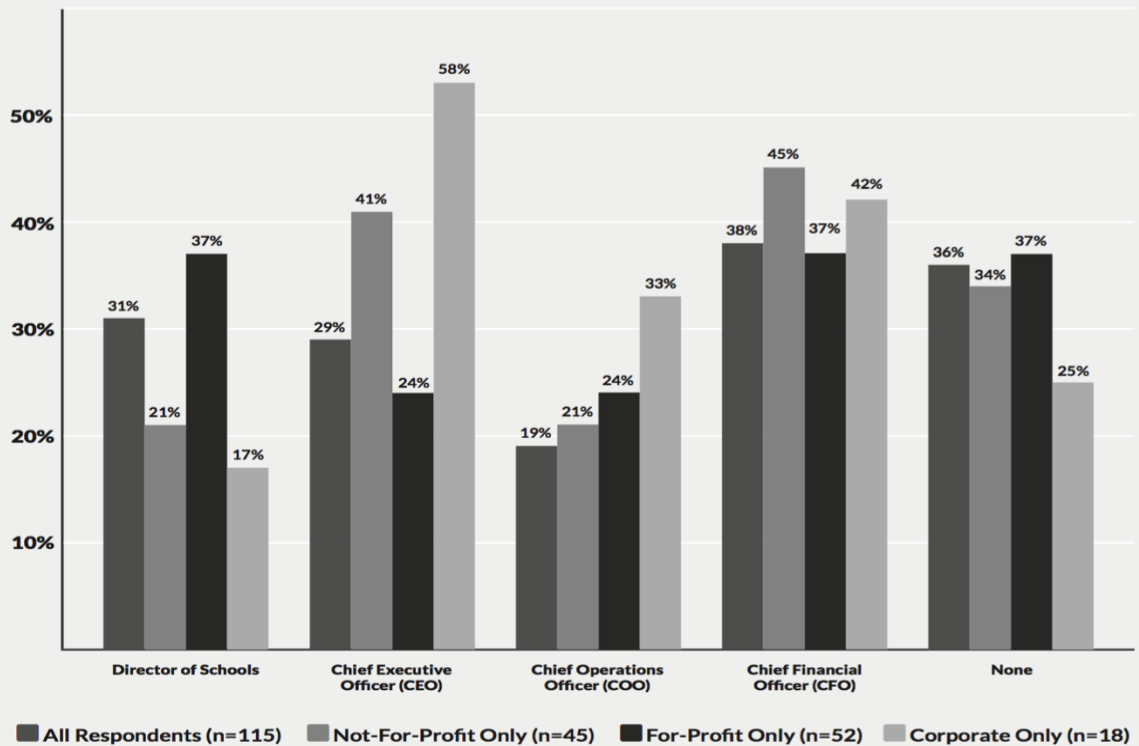
5.4.5 The Discourses of Job Titles

The final line of analysis in relation to RQII considers whether the discourses of managerialism are being found within international school job titles (specifically the title given to the post of Head). As observed by one of the recruitment consultants:

“Fancy job titles certainly seem to be creeping in. The cynical view would say that the roles are exactly the same, but the fancy title gives the Head, whatever he [sic] gets called, more status” (AD)

Within the recruitment documentation, the most popular job title was ‘Principal’ (267 occurrences). Following behind though (188 occurrences) was the more managerial ‘Director’, a term that appeared more than twice as frequently as ‘Headteacher’ (67). This line of enquiry was expanded in the online questionnaire:

CHART 16 – Graphs showing frequency of various job titles/positions within the sampled schools (by ownership type)



While non-educational job titles do not dominate, the titles Director of Schools and Chief Executive Officer (CEO) are used in just over a quarter of the sampled schools (31% and 29% respectively). As Ng (2003) predicts will result from managerialism, a number of Heads are finding their roles retitled. In terms of specific context, 58% of the corporately owned schools use the title CEO, more so than any other type. Perhaps more surprisingly though, as compared to 24% in for-profit schools, 41% of the not-for-profit schools also claim to have CEOs.

In considering why the CEO title may be finding popularity, one possible answer is managerialism. Bespeaking managerial ideals, having a school led by a CEO suggests that the school is sufficiently 'business-like' to require such a position; the school must, surely, be well-managed, efficient and performance-orientated if it is *managed* by a CEO. Equally, for the Heads themselves, while understanding of business tools may hardly stretch beyond SWOT (see above), in being assigned

the title CEO, they too potentially benefit from the authority and legitimacy (the power) of managerial associations.

These arguments also offer potential explanation for the greater extent of CEO job titles in not-for-profit schools. Conceivably, as a reaction to the dominance of corporate and for-profit schools⁵², the not-for-profit schools may perceive a need to capture business-like credibility. By adopting corporate job titles, they gain (some of) the authority and legitimacy of commercial discourse and there is a (perceived) re-balancing of power. Paradoxically, it seems that the for-profits have more to gain by distancing themselves from those very same discourses; proportionally fewer for-profits use the title CEO (24%) than any other type of ownership. What the data reveals might, therefore, be considered a form of inverse discursive affect; the not-for-profits are seduced by managerialism and the for-profits are seduced by discourses which reduce (hopefully) the perception of managerial influence.

That said, regardless of the influence on schools, for Heads the titles are claimed (on the surface at least) to be incidental and almost unwelcome. Where Heads interviewed had the title CEO they often demonstrated reluctance towards embracing that title:

“It’s just a job title, I didn't choose it. It makes no difference to what I do – I am a principal” (Interviewee C10)

This outward reluctance does not, of course, preclude the fact that the titles *do* something to what it means to be a CEO/Director in charge of a school. The discourses that construct what it means to be a CEO will be read differently by each individual, but there is the potential that the

⁵² As previously noted, these school types now accounting for 80% of the market.

role is performed differently to that of a Head, albeit subtly. Given the title CEO, the Head may be expected, and may expect themselves, to operate in more managerial ways.

Indeed, despite Interviewee C10's reluctance to adopt the title, it was clear that his approach might be described as CEO-like:

“Schools can be very inefficient, very wasteful. Any good Head must be able to manage schools better than that. I manage a group of [number] schools, that means I am very aware of where these inefficiencies are and how we can iron them out. If the Heads can't see how, it's my job to show them.” (Interviewee C10)

As this quote suggests, the title CEO symbolises particular discursive assumptions and power affects, ones that represent a more managerial stance than simply a management one. Significantly, for this study, these discourses are performative (Butler, 1993); they shape the subject. Notwithstanding Interviewee C10's outward reservations, he does have the title CEO and he performs the role from this perspective. He may not (outwardly) *identify* as a CEO but he does act as one, those acts also getting inside his (and others) subjectivities. The role is constructed differently not because it is necessarily technically different (as the lack of specific business knowledge suggests) rather because the subject is *discursively* constructed through managerialism. These affects may be limited to rhetoric about competition, clients and performance, stopping short of actual business-like practice, but that makes the disciplinary influences no less real for the educational subject now (also) governed into managerial form.

Additionally, though more speculatively, given that he manages a group of schools, Interviewee C10 may also be perceived by staff across those schools in a CEO-like fashion. Seen by his staff in this way and, as a former Chair of a large international school federation, also seen by fellow Heads in this way, the discourses of being a CEO are likely to be taken as legitimate, credible and necessary for advancement. It follows that, wishing for career progression, Heads with more traditional job titles might follow the lead of those with the title CEO, further normalising managerial discourse across the field.

Seen here then is an example of how practices 'out there' find their way 'in here'. Some Heads are required by context to take on CEO-style job titles (an external affect) and resultantly the insertion of such titles into the field has discursive effects with regard to the type of identity work professionals undertake. While this situation does have the potential for conflict – as noted many Heads currently perform (outward) identity work which rejects these titles – it also presents opportunities. For those Heads able to balance the requirements of being a CEO (in title or form) with the requirements of being an educationalist, there are financial, occupational and ontological advantages (potentials explored further in consideration of RQIII).

5.5 DISCUSSIONS

This section has sought to examine the nature, predominance and type of discursive processes through which the professional educational subject is created and empowered. This analysis uses evidence from the recruitment documentation review and online questionnaire to consider the presence of educational and/or managerial discourses as potentially disciplinary influences on Heads as subjects.

As the data shows, Headship seems governed very much by the discourses of education; across each data source Headship is fashioned around moral purpose, the concept of service and a 'student first' conscience. For instance, the predominance of language related to students/children, the relative lack of corporate job titles and the prevalence of 'appraisal' as opposed to 'performance management' each suggest a professional conscience constructed by and through educational discourses.

However, while there may be little direct reference to profit, there is evidence of some business-like influence. Use of business terminology such as "clients" and "inefficiencies", talk of market positioning and, implicitly, of differentiation, points towards managerialism's tendency to actively create competitive environments, especially where a competitive imperative is not a natural consequence of market forces (Ball, 2003b; 2015). In an example far removed from educational purpose, one online questionnaire response even referred to the purpose of performance management as "teacher recalibration". That this terminology was explained as "language coming out of the corporate office" makes it no less managerial for that fact. Regardless of functional need, this talk embeds and legitimises managerial practice; additionally, this talk also enhances management power and affirms management identities (a potential explored by RQIII).

Combined, these findings suggest that international school leaders *are*, at times, exposed to shades of business-like discourses, but that its influences are moderated through relationships of power with educational discourse. It is in and through these moderations where managerialism is found. For example, few schools may have adopted the business practice of forced-ranking, but use of 'Professional Growth' as a means of encouraging individual *self*-audit does evidence managerialism. Indicative of how insidious this discourse can be, schools adopting Professional Growth are likely unaware that they are actually sharpening the managerial gaze rather than softening it.

Managerialism then, as the literature review ascertained, can be recognised as a 'space between' the benign necessities of educational management and the precepts of commercialism. Performance-related pay and profit share may not yet have found traction, but the uptake of 'Professional Growth' suggests that the performative intentions of these 'business-like' models (a panoptical audit of the subject by the subject) have been sanitized in terms acceptable to educational sensitivities. Equally, framing efficiency measures (a timetable review, perhaps) as a need to improve educational outcomes, though managerial, is hardly ignominious. However, if that same review was framed in terms of extracting more financial value out of resources (teachers) it would likely sit less well with the educational subject.

In these terms, managerialism can be seen as a discursive space where educational and commercial purpose are brokered, translated and combined. Managerialism is not axiomatically 'business-like' but nor is it benignly educational. This managerial 'space between' is illustrated in Table 13a (overleaf):

Table 13a: Illustrative differences between management, managerialism and commercialism (as practice and discourse)⁵³

DISCOURSES OF EDUCATION DOMINATE	THE SPACE BETWEEN	DISCOURSES OF COMMERCIALISM DOMINATE
MANAGERIALISM		
DISCURSIVE CONSTRUCTIONS (AND RESULTANT PRACTICE)		
<p style="text-align: center;">INTERNAL FOCUS</p> <p><i>A 'student first' discourse; celebration of student success; a focus on the individual.</i></p>	<p><i>The discourse of student 'first' remains but becomes mixed amongst celebration of <u>school</u> successes.</i></p> <p><i>Practices such as: appointment of Director of Marketing (or equivalent); increase in spend on marketing activities; focus on student roll and churn rates.</i></p>	<p style="text-align: center;">EXTERNAL FOCUS</p> <p><i>Discourse shifts to value propositions, with a school brand 'sold' to stakeholders. Students that don't 'fit' the brand are (in multiple ways) rejected. Education itself is commercialised. Marketing becomes a central activity and an expectation of all staff.</i></p>
<p style="text-align: center;">ADMINISTRATION</p> <p><i>Practices such as: payroll, induction, internal reporting systems, departments/year groups, low labour turnover, permanent contracts.</i></p>	<p><i>Practices such as: external reporting systems, team-based structures, fixed term contracts and contracts lengths shorter than average tenure, cost-centres.</i></p>	<p style="text-align: center;">CORPORATISATION</p> <p><i>Practices such as: performance-related pay, onboarding, data metrics, profit-share, zero-based budgets, high labour turnover, contract non-renewal common, profit-centres.</i></p>
<p style="text-align: center;">FINANCIAL ADMINISTRATION</p> <p><i>The discourse frames finance as a means to provide for educational purpose.</i></p>	<p><i>A discourse of financial performance/efficiency begins to govern practice.</i></p> <p><i>Practices such as: variance analysis, financial metrics and dashboards.</i></p>	<p style="text-align: center;">FINANCIAL PERFORMANCE</p> <p><i>The discursive environment shifts towards a profit-orientation. Talk is of return on investment (ROI) and of return per teacher; budget, not values, becomes driver of decision-making.</i></p> <p><i>Budgets are used to hold <u>teachers</u> to account.</i></p>
<p style="text-align: center;">APPRAISAL</p> <p><i>Results matter but their value and importance is governed by educational discourse. Targets relate to education.</i></p>	<p><i>An <u>outcomes</u> discourse becomes prominent (testing, quantification).</i></p> <p><i>Benchmarking of student results; target-setting for students and teachers.</i></p>	<p style="text-align: center;">PERFORMANCE MANAGEMENT</p> <p><i>The dominant discourse is <u>performance</u>.</i></p> <p><i>Targets are non-educational (financial, roll, marketing).</i></p>

⁵³ These, of course, are not the only manifestations of management and managerialism and of the 'space between' educational and commercial practices and ideals. These particular examples have been chosen because they represent specific apparatus and language that points to how management and managerialism play out at school level. It is also important to highlight that the space between is itself not 'new', positions within this space are 'always already' governing the subject; what Table 13a attempts is a clarification of how this discursive space is itself constituted and how it might be used to recognise particular forms of identity work.

In summary, addressing Research Question II, for international school Heads the processes of identity formation seem most readily framed by the discourses of education. Given that education is the area of specialism, it would perhaps be surprising, and worrying, if this were not the case. Heads are not, however, immune from the influences of managerialism. Use of terminology such as 'clients', 'performance', reference to market positioning and the need to understand competitive forces indicates the extent to which managerialism is present across, and the extent to which its discourses influence, Heads' identities.

This section has also shown how discourse, manifest in the talk of Heads and in field-wide requirements and conceptions of Headship, might be revealed. Through Table 13a, suggested is a managerial space where commercialism is translated (and softened) educationally, thereby taking a form through which it is more readily insinuated, with potentially positive and negative outcomes, within the educational subject. Identification of this space is important because it allows for a more nuanced analysis of identity work and its various processes. A Head may resist business-thinking but they are, perhaps unknowingly, perhaps reluctantly and perhaps sometimes even willingly, the subjects of managerialism. Those affects may be moderated through educational discourse but (re)created in the space between, they are influences nonetheless. It is the implications of these arguments for the identity work of international school Heads the final research question addresses.

5.6 RESEARCH QUESTION III (RQIII)

Where the previous sections considered the prevalence of practices associated with managerialism (RQI) and the discourses that seem to be governing international school Headship (RQII), through the medium of twenty-five face-to-face interviews, this section turns attention to

the Heads themselves. Under investigation is whether Heads are disciplined by educational and managerial discourses in complimentary, contradictory and/or competing fashion. Additionally, in light of findings in the literature review, is there evidence of hybridity?

The ways in which Heads are governed as educational and/or managerial subjects can, I maintain, be tested through reference to Table 13a. In combination with Lawrence and Suddaby's taxonomy of institutional work (2006), the table provides a heuristic which might help reveal particular educational and/or managerial undertakings (institutional work) and, through the language they use to describe their context and their selves, a Head's relationship/s to those discourses (identity work).

5.6.1 THE HEAD AS EDUCATOR: I Teach, Therefore I Am?

With questions of hybridity at the fore, the focus of each interview was the ways in which power and knowledge produce certain types of subjects. Methodologically, relevant here is use of the personal pronoun "I"; in other words, the ways in which Heads self-govern their identities in relation to education and/or managerialism:

"I much prefer talking about children, classrooms, and learning..." (Interviewee C11)

"I love being in the classroom; the job has gotta (sic) be about what's best for the children" (Interviewee C22)

As these quotes and the many others of which they are indicative illustrate, Heads seem to be strongly disciplined into educational subject positions. In defining their sense of self participants referred to being "student focused" (Interviewee C18), "responsible for learning" (Interviewee

C2), “curriculum-centered” (Interviewee C17) and “...single-mindedly educational” (Interviewee C12). Particularly illustrative was the comment by one very experienced not-for-profit Head who claimed, despite demonstrating an innate ability to bridge multiple subject positions (see later), that:

“My happiest days have always been when I was in the classroom. The happiest year of my life was my first year of teaching” (Interviewee C15)

Similarly, Interviewee C1, when asked if he saw himself as the guardian of educational values, without pausing to let the question conclude (from an SCA perspective, a significant interjection), forcefully answered “absolutely”. Likewise, Interviewee C13 drew attention to his role as “Head *Master*...Master referring to school mastering”, thereby deliberately highlighting the terms linguistic etymology, its educational genealogy and his own sense of professional identification.

These examples are not in isolation. When specifically asked during the interview to describe whether their natural inclination was towards that of educationalist or manager (whether their heart was in the classroom or, metaphorically, in the boardroom) - achieved by asking each participants to rank themselves on a scale of 1 (management) to 10 (educationalist) - on first response 18 of the 25 interviewees (72%) placed themselves firmly in a range between 7-10:

“I’m a ten. I was born an educationalist, bred an educationalist; I knew I was going to be a teacher. I call myself a teacher, not a Head Teacher” (Interviewee C5)

“I would be a nine. No matter that I am now a CEO, one of the things I’ve always done is be at the front gate every morning, saying ‘good morning’ to the kids; they are the ones who must come first”. (Interviewee C16)

By holding onto the traditional (educational) discourse of ‘student first’ Heads, it seems, want to slow down, solidify and potentially determine (at least in part) the practical demands to which they are subject. By casting non-educational identifications as less meaningful, Heads are asserting the moral superiority, in their view, of education. These identifications provide a base of ontological security from which they create boundaries with regard to what is acceptable within the professional order. Significantly, these barriers are not just occupational they are also ontological – they serve Heads practically and personally.

However, probing further, and challenging the purity suggested by these self-descriptions, while some interviewees conceded that the reality of their role was, in practice, different (see below), others pushed back, more strategically *policing* (to borrow a term from Lawrence and Suddaby’s 2006 forms of institutional work) the boundaries of their self-identification:

‘I would walk if any sense of commercialism came before education” (Interviewee C20)

“...if I was under pressure because [the owner] wanted to divert money to other businesses I wouldn’t feel comfortable. ‘Really? Is this what I am in it for?’ The investment is the children” (Interviewee C3)

“I much much prefer talking about children, classrooms, and learning.” (Interviewee C6)

Going even further, and echoing Lawrence and Suddaby’s (2006) *disassociating moral foundations*, Interviewee C10 suggested that, as Head, his time is “too important” to spend on non-educational tasks:

“I have a business manager to manage business, why should I do that? *I have more important things to spend my time on.*

The Head is the expert educationalist and I think the educationalist should have the final say; if it’s educationally right the business people should just make it work.”

(Interviewee C10; *emphasis added*)

Further resonant of Lawrence and Suddaby, here in terms of *constructing identities*, this view of what Heads should and shouldn’t do was shared by, amongst others, Interviewee C24:

“I’ve always said, “I’m not a marketer here.” Obviously I have to market the school, but that’s not who or what I am, nor what I should be doing. My training was in teaching and my focus should be on education.” (Interviewee C24)

As the literature review suggests, these comments bespeak the disciplinary potentials at the epicentre of educational discourse (Hargreaves, 1994; Zembylas, 2003). The repetition by Interviewee C6, the questioning of purpose by Interviewee C3 and the strength of Interviewee C20’s stance each bespeaks the internal question that Tateo (2012) suggests is common to all

teachers: is what we are doing in the interest of the children? In their positioning of their professional identities as distinct from (indeed, as “more important” than) other possible identities (“that’s not who I am”) the Heads are mirroring Michael Fullan’s (2002) critique of the narrow conception of Head as ‘just’ a manager and his claims of education’s wider moral purpose. To ask Heads to spend time on (and to identify with) non-educational matters risks drawing them away from, as some interviewees saw it, the more important moral purpose of the role. As Interviewee C7’s “selling your soul to the Devil” stance underscores (5.4.1), so strong is educational discourse that to deny it is to cast oneself outside of the professional boundaries, and therefore outside of belonging – a vulnerable place to be.

Ontologically then, in terms of their sense of professional self, Heads do seem to be constructed as subjects through discourses which confirm them as *educational* professionals, and they do seem to strategically position themselves so as to retain and benefit from these identifications. This is unsurprising; all of the Heads studied and trained, after all, as teachers. Given this background, it would be somewhat odd if they were able to shed all semblance of their former identities, carving out entirely new ones. Inevitably, whatever the management and/or managerial demands of their current role, there will be echoes from the past – fragments of previous identity work that layer to form the (professional) subject of today. In short, Heads are unwilling to give up their identifications as educationalists, identifications from which they gain ontological purpose, meaning and security. Underpinned by the values and beliefs associated with pedagogical focus, educational traditions and commitment to the concept of public service, the very core of a Head’s identity narrative bespeaks (and speaks) education. A Head may know that their role is less ‘about the student’ than they claim, but, for fear of being professionally ostracised, they are highly unlikely to admit it; indeed, speaking of it helps them to slow down the impact of alternate discursive constructions.

However, despite their outward claims to the contrary, with identity theorised as impure, messy and fluid, the identity work of Heads cannot be only one thing, one pure educational self. No such thing exists. Heads are the subjects of *multiple* intersectional discursive influences. They are, of course, mothers, fathers, lovers, artists, musicians and multitude other things, here though the focus is on multiplicity as it affects *professional* identity. In this regard, Heads may cling strongly to the precepts of education and they may use its discourses to affirm their sense of professional self, but they are also governed by other discourses, other symbols and by the appeal of other possibilities. Indeed, despite a strong educational bias, none of the Heads surveyed occupied only one subject position; each undertook varying types of identity work.

5.6.2 THE HEAD AS MANAGER: I Teach, But I Also Manage

As the commentary above demonstrates, the interview participants were reluctant to abandon entirely the important sense of self they achieve through the discourses of education. There was, however, recognition that management is a feature of international school Headship and that Heads must also be managers. No interviewee described themselves as purely an educator; some wished it so – answering “11” in response to where they saw themselves on the 1-10 manager-educator spectrum – but all, on further discussion, acknowledged the hybridity of their role (if not always hybrid ontologies):

“11...in my heart 11, for sure. But, if you are asking me what I actually achieve, then maybe 7” (Interviewee C12)

“I’d like to think of myself being an eight, but the reality of what I do on a day-to-day basis, and the reality of how I impact the school, is probably a six.” (Interviewee C11)

“I think, fundamentally, a passion for education is critical. If you’ve got any ambition to be a Principal, you need to be a 10. But, as you became closer to that role you get caught up in the business of running a school, which can take you a bit by surprise. You have to want to be 10, but, sadly, you should probably expect to be a 5.” (Interviewee C25)

Key here, is use of personal and emotive language such as “in my heart” and “I’d like to think of myself”. Similar to the incidental hybrids of McGivern *et al.* (2015), the interviewees *recognise* the plurality of their role but there is a *reluctance* to let that plurality affect their identity. These subjects undertake managerial practice as necessary (and use language found in the ‘space between’ Table 13a) but they resist managerial identifications.

For some Heads, however, this space between is the nexus between educational and managerial *identifications*:

“It has to be a balance between our educational strength, our management sense and our vision” (Interviewee C21)

“...you’ve got to have that subtle understanding in terms of education; it has its own business model. In business you’re always going to look for the next way to make money, whereas I think in education you have to be always looking for the next way to improve what you’re doing, part of that

might be money but it's only one strand of it, I think there's more strands in education (Interviewee C2)

The turn here is that the language of these Heads is less reluctant, less reticent. There is a greater sense of pragmatic acceptance of managerialism (it is seen as a way to "improve what you're doing") and hints at an opening up of ontological acceptance of managerial identities (the use of "our" in relation to "management sense").

In several cases, attachments to managerialism extended to Heads retelling stories of how they encourage (in Lawrence and Suddaby's terms, *educate*) staff to think more commercially and to perform accordingly; a greater willingness to strategically use (and to increasingly identify with) practices found on the right of Table 13a:

"There are lots of good teachers that I have let go, not because they're not good, it's just they don't fit the context; they don't get that things are different here...not comfortable with the owners and with our performance criteria. Heads have to learn to be comfortable but some teachers never do." (Interviewee C24)

"I have to explain to the teachers that it is the *clients* who are paying your wages, and they will look at the quality of your marking, how you dress... these things are important, some don't get it" (Interviewee C19)

“I understand the real world, in the real world if you are part of a team that fails or screws up a project, you are fired. For some reason, teachers don’t get that. In school environments, they don’t understand that, well, why shouldn’t it work the same – if you’re failing, if you’re under-achieving, if you’re under-performing, why should I pay your salary?” (Interviewee C23)

Key here is how these Heads position themselves in relation to teachers. The Heads consciously portray themselves as understanding of managerialism (and comfortable with it) whereas teachers less so. Identity work here is deliberately intended to *mythologise* the power of the market and to *valourise* Heads as different, affirming the exalted and enlightened status of Headship.

In other interviews, the position of the Head was less abstracted, less focussed on schools and more on their *self*. That is, there was an indication of some Heads identifying with the managerial elements of the role:

“I have a very good understanding of the corporate side of things [corporate motivations] and how it can work, that gives me advantages when dealing with corporates [sic]”
(Interviewee C10)

“I would say that I am focused on the educational well-being of the young people in my care but the business context provides a really excellent discipline for what I do.”
(Interviewee C13)

In each of these examples, the Head in question has moved away from *disassociation*. Managerialism (and perhaps even commercialism) is no longer simply recognised occupationally, use of the personal pronoun places these practices ‘inside’ the subject. In his reference to “advantages when dealing with corporates” Interviewee C10, for example, is strategically *valourising* the benefits of managerialism for himself. Similarly, Interviewee C13’s use of “discipline” points to the control *he* gains from his managerial positioning; he is both reconfiguring professional norms and disciplining the organisation, the staff, and his own self through managerial imagery.

This identification with managerialism seemed to extend, in some cases, even so far as to assert that corporately owned educational forms are “better”:

“...what I would say is that, in the world we live in, I think the corporate model is the better one for the future. It is the better-informed, it’s the better-connected, and there is more management expertise out there to access.”

(Interviewee C4)

Use of the term “better” may be relative and subjective, and it may be a position held by only a few of the interviewees, but eventually these strategic moves do seem to find their way inside the subject. Interviewee C23, one of the most experienced Heads in the sample, seems so governed by the harder edges of Lyotard’s performativity that he is willing to take *personal* responsibility for school performance:

“I told [the Board] I would turn the school around. If I don’t they can fire me. That’s as it should be. Perform or piss off [sic]” (Interviewee C23)

In summary, in response to the disciplinary influences of managerialism, Heads can be seen to be undertaking important identity work. While not privileged over educational discourses, the presence of managerial language and the degree to which some Heads strategically embrace managerialism highlights the reductionist nature of an educational-managerial dichotomy. Even those Heads who frame managerialism as outside of their self-identification acknowledge its presence and importance. There is, at the very least, recognition by all Heads of the occupational requirement to engage with managerial practice. For other Heads managerialism is a discourse through which the status of Headship is affirmed and enhanced. Both positions require reconciliation in terms of identity work but both can be seen to give advantage to the manager-subject.

5.6.3 Exploring Hybridity

In keeping with a position which sees the educational-managerial binary as false, an outcome of previous research has been a need to move away from the notion of a pure and singular professional – practitioner *or* manager – towards hybridity (McGivern *et al.*, 2015). As interviewee C5 insightfully noted:

“Heads have to be a little bit more malleable, flexible and more chameleon; they have to move with the ebb and flow of their Boards, corporate structures or private owners”
(Interviewee C5)

Similarly, consistent with Hoyle's (1975) view of the *extended* educational professional, Interviewee C10 saw no contradiction between his role as educator, school administrator and CEO; indeed, he identified with each of those roles simultaneously:


“I'm not quite sure why any roles count as non-educational, and I'm not being sarcastic and playing with words. I span lots of different roles – Principal, business, HR, even construction and projects management, hell [sic], I even get involved with our bus routes. But, ultimately, I put all of that under one umbrella: education” (Interviewee C10)

Such duality shows that Headship is not concerned with *either* education *or* managerialism, it is a complex blend of moderation between the poles, an interdiscursive mix of *both* traditional practice *and* newly privileged managerialism. As the data above reveals, a Head's occupational (*practice*-based) and ontological (*identity*-based) responses need not be the same. Separating, linking and merging these responses is how Heads *themselves* engage with managerialism.

These responses are represented in Table 13b. The table is labelled as 13b to retain its linkages with 13a (practice and discourse) and to indicate that a similar space between exists with regard to managerial *identifications*. At the left of the table, Heads can be seen to be identifying more readily with Ball's professional (i.e. educational) values. As in the examples above (5.6.1), identification comes via a 'student first' discourse and through educational values and moral purpose. These Heads may be perfectly willing/able to perform the *occupational* requirements of managerialism but feel a sense of personal unease when doing so, moderating, resisting or refusing elements of managerial *identification* as a result. In contrast, at the right of Table 13b, as the examples in 5.6.2 show, some Heads identify more readily through business-like discourse,

seeing benefit in commercialism occupationally and ontologically. Here the Head is more likely to refer to education as a product, to co-opt business discipline and to identify with market values, referring to the “real world” and to themselves as understanding of it. The space between is where these identifications merge.

Table 13b: Illustrative examples of Heads identity work in relation to managerialism

	MANAGEMENT	THE SPACE BETWEEN	COMMERCIALISM
	MANAGERIALISM		
			
	HEAD'S RESPONSE:		
Values (Ball, 2006)	Professional Values		Market Values
Linguistic Reference Points	The Head relates their identity to: <i>Students, children, curriculum, parents, community, values, emotions, educational excellence.</i>	The Head relates their identity to: <i>Accountability, external responsibilities, effectiveness, business context, business acumen, competitive environment, marketing, clients, sales/selling.</i>	The Head relates their identity to: <i>Profit, returns, key performance indicators (KPI's), educational 'products', corporate, business discipline, differentiation, drive, leverage, positioning.</i>

For Heads identifying with the ‘space between’ effective *management* is recognised as essential, but value-free *commercialism* is seen as inappropriate and damaging. In the space between there is identification with accountability and with performance but, as hybrid, the Head remains also governed by educational purpose. The Head identifies at some point between educationalist (governed by educational values) and business manager (governed by market values). Within this space, harder edged commercialism may be rejected but managerial identifications are embraced where they complement, not supplant, values-based approaches. The reality, this study has established, is that most Heads operate somewhere in this space between.

Building on the practices and discursive affects outlined in Table 13a, the distinctions in Table 13b help draw attention to the different types of *identity work* Heads undertake in response to the potentials of this managerial space. Using this analytic, various hybrid subject positions became apparent across the data. In the analysis below, these positions are translated into a series of case-studies, each case summarising a particular discursive space through which Heads experience subjectification. Those subject positions are:

- The Teacher-Head
- The Head-Teacher
- The Pragmatist-Broker
- The Educational Manager
- The Educational Executive

Before addressing the detail of each position, it is important to point out that in no sense are these descriptions presented as fixed and stable; they are presented simply as the varying types, tactics, manifestations and indications of the different identities and different hybridities observed. Though dominant and subordinate discourses seemed to govern different types of identity work, the sheer dynamism and multiplicity of discourses precludes any final, total and all-oppressive professional order; there isn't and never has been a 'pure' version of professionalism that is now being hybridised and nor are there pure hybrid forms. Thus, contrary to the suggestion by McGivern *et al.* in their study of health care workers that only certain types of hybridity represent professionalism (with others refusing or downplaying managerial components of the role), the argument here is that all forms of hybridity are representations of professionalism – albeit, perhaps, representation via new/different/alternate ways of enacting the profession.

5.6.3.1 *The Teacher-Head*

For the individual who identifies as a *Teacher-Head*, their relationship with managerialism is an occupational one; the *Teacher-Head* is a hybrid but only at the level of practice. Resonant of Hoyle's restricted professionalism (1975), this subject values the practices of education; at heart they remain a practitioner. The demands of management were reported as functional requirements of the role, while the demands of education were described as more emotionally fulfilling:

“The way that I want to lead this school is to be out in the classrooms, talking to the kids, talking to teachers, seeing what is going on; being out there, not here in the office. I do [management] because I have to, but if I wanted to be a manager, I would've been a manager” (Interviewee C17).

The reluctance inherent in Interviewee C17's comments is representative of McGivern *et al.*'s incidental role-claiming narratives built around 'reactive professional obligations' (2015:11). Interviewee C17 recognises her wider responsibilities, and, reluctantly, she accedes to the requirements (“I do it because I have to”). Identifying as a teacher, her heart though is clearly in the classroom and to protect (for her) a source of ontological purchase she privileges that mode of self-identification; all the while knowing that she must, at times, take on tasks/identities she seems less than comfortable with (“if I had wanted to be a manager, I would have been a manager”). She identifies, and even then reluctantly, very much on the left of the management-managerial spectrum (Table b).

For the *Teacher-Head* management is, therefore, incidental and necessary, undertaken because of subjugation to normalised occupational demand rather than, overtly at least, for the rewards of being (and being seen as) a manager. The subject is rendered so strongly through educational discourse that alternate identifications are segmented as Other, to be resisted and contested where possible, embraced only when must. Importantly, this is not to say that such subjugation is not also empowering. Interviewee C17 clearly draws a strong sense of self (and pride) from her educational subject position.

5.6.3.2 The Head-Teacher

In describing the *Head-Teacher*, the reversal of the nouns is significant. These individuals retain their strong identification to education, and they remain restricted/resistant in their professionalism. They also though recognise and understand that Headship requires management tasks – they understand that a Head is not only a teacher but also the Head of the teachers (a manager). *Head-Teachers*, the interviews suggest, retain their educational identities and privilege educational norms but they also more willingly recognise the need for management, albeit by obligation and as briefly as possible.

Interviewee C18 was the most *Head-Teacher* like. The interview took place in a classroom, a classroom that doubled as her office. When asked about this choice of location, she indicated that having the classroom as a base allowed her to “manage from the heart of the school”. She was clear that the demands of the role require management tasks and even that she thinks managerially (she noted that staff appraisal was “not as rigorous as [she] would like”). It was also

evident that she has *worked at* being seen as a manager (“I like being ‘mum’ [to the staff] but I have had to learn to be ‘dad’ more often”)⁵⁴.

That said, Interviewee C18’s identity work remains very much that of educator. Indeed, so strong is her desire to identify as a teacher, she still teaches full-time. Despite indicating that she has worked at a manager-identity, she also indicated that she ‘hides’ the management elements of her role by undertaking them at weekends; she attempts to ‘repair and conceal’ (Lawrence and Suddaby, 2006:248) perceived misalignments between (old) professionalism and its (new) managerial context. Interviewee C18 understands the need to manage, and is reflexive enough to recognise her own reluctance in this regard (“I have had to learn to be ‘dad’”), but she is cautious about the extent to which she allows these requirements to affect her sense of self – she still wants to be seen as “one of them”; as a *Head*, but as a *teacher* too. Moreover, where possible, responsibility for managerial thinking (sharpening appraisal processes, for example) was segmented out to the Business Manager (her husband) and she resisted managerial identifications:

“I am very happy with the separation of Church [herself] and State [business] so to speak. I 100% just love being in the classroom and I won’t let the job change that. Doing what my husband does that’s not me and I don’t want it to be”.

(Interviewee C18)

⁵⁴ The gender associations here, though beyond the scope of this thesis, are particularly interesting. It is evident that ‘being dad’ is associated with being a manager whereas being mum is associated, by implication, with something less managerial and more pastoral.

As with the *Teacher-Head* this professional also experiences subjectification through educational discourse. The subtle difference is that *Head-Teachers* accept, albeit reluctantly, that the role is not purely educational. They may not be willing to give up their educational identification but they do recognise the need for occupational flexibility; they are able and willing to engage with management practice and (albeit perhaps tentatively) with managerialism, at least incidentally. For Interviewee C18 there was no refusal or negation, as a *Head-Teacher* she understands that managerialism is (now) part of Headship, but its precepts were very much secondary to educational purpose: “I just do what I need to run the school”.

5.6.3.3 The Pragmatist-Broker

The *Pragmatist-Broker* adopts a similarly incidental position but in an increasingly willing fashion. Refusal, reluctance and segmentation have given way to moderation and, where there is benefit, to accommodation. *Pragmatist-Brokers* may have come to ‘know themselves’ (however illusory that knowing is) through historical identity work related to education, but, like the clinicians studied by Denis *et al.* (2001), these professionals strategically adapt their identities in order to deploy an appearance (*dramaturgy*) of complying with managerialism while retaining their educational autonomy. These individuals are willing to get ‘their hands dirty’, stretching the boundaries of what they see as legitimate, temporarily operating in managerial roles where it serves, or is at least seen to serve, educational (and their own career) ends.

For example, while Interviewee C5 described himself as a “teacher not a Head teacher” (thus clearly announcing his preferred identification), he was also quite comfortable leveraging the discursive resources inherent in managerial identities: “I see business thinking as a positive thing”. Asked to elaborate, and evidencing the discursive currency offered by pragmatism, he explained that he saw business (for which read managerial) thinking as a potentially useful tool,

citing an example where he was able to get an educational project approved by trading the cost against savings from staff redeployment (he reduced teacher headcount through more efficient timetable allocations).

Problematically, and indicative of the underlying brokerage of identifications, these subjects reported that the demands of management could sometimes detract from values they associate with their educational identities. For some participants, the choices, compromises and concessions that such brokerage demands are accompanied by feelings of anxiety. For Interviewee C19, for example, performing multiple identities does indeed feel like work:

“I think it accumulates, each decision adds up, each time is a little chip away at your soul – to the point where you think ‘I can’t do this anymore’. I think you make your stand on certain points because I wouldn’t be true to myself if I didn’t, but you can’t block everything...sometimes you just have to go with it... take another chip and live to fight another day”

(Interviewee C19)

Because of this potential for inner conflict, hybridity is rife with (potential) paradoxes. Interviewee C7 provides a useful example. She is an early career Head who has worked her way through the teaching ranks securing Headship by virtue of lengthy and successful educational experience. She also holds an MBA. At the time of interview, she was working in a for-profit context but believed, as previously noted, that Heads working in corporate contexts had “sold their souls to the Devil”. Her rhetoric was consistently focused on education, with the discursive currency of ‘student first’ fiercely hailed:

“You have to say: “I am accountable, I’m responsible for your child”; if you’ve never done that, if you don’t know what it means to put the student first you’ve got no business being a Head” (Interviewee C7)

It was clear though that the experience of Headship (and perhaps her MBA experience/knowledge) was affecting her identity work:

“I’m not against business thinking, we must have business systems, we must have – we can do a business analysis of everything we do. But that doesn’t mean whatever we decide we make the same decision that a business would” (Interviewee C7)

The contradiction inherent in these two positions is a useful exemplar of why the incidental-willing dichotomy of McGivern *et al.* (2015) does not fully reveal the nuanced identity work the hybrids in this study undertake. Interviewee C7 uses ‘habitual interpretive agency’ to ‘represent and protect’ professionalism (Emirbayer and Mische, 1998 in McGivern *et al.*, 2015:18), seeking to influence colleagues to maintain traditional professional norms. However, she is also agentic and purposeful in her adoption of plural occupational and ontological demands. For this Head managerialism may be *incidental* to her identification but she can see its necessity (and benefit). Recognising the value of managerialism, she has *willingly* and strategically worked on *herself* and opened up other identifications; she willingly undertook an MBA (assumedly to develop that side of her skill set and, in turn, her identity) and is pragmatic in relation to the potentials of managerial-thinking. She is passionately educational but also political in her identity work.

Interviewee C7's positioning appears to be one of moderation, accommodation and contingent pragmatism. Framing education in this way allowed Interviewee C7, and others who took up similar positions, to adopt forms of identity work in which pragmatism and conformist subject positioning are blended with/balanced against critique of traditional educational methods as outdated and inefficient. The discursive boundaries of professionalism are seen for these subjects in terms of what is considered necessary to deliver better educational outcomes. So long as managerialism supports educational purpose, it is comprehended as professionally valid and legitimate and, thus, these hybrids willingly subject themselves to its governance for pragmatic purpose. Interviewee C7 understands that Headship requires and demands management and, moreover, she has disciplined herself (partially) into managerial subject positions. Although she identifies herself, first and foremost, as an educator she is sufficiently self- and politically-aware to recognise that other identifications offer pragmatic benefit.

5.6.3.4 The Educational Manager

The *Educational Manager* goes one step further. Here, while retaining strong association with education, accommodation within identity work of alternative discourses is more *extended* (Hoyle, 1975), more willing and 'projective interpretive agency' (Emirbayer and Mische, 1998; in McGivern *et al.*, 2015:4) more common. These subjects can see the advantages of managerialism for their own self and for the profession itself. That is, they identify with the space between (and perhaps even to the right of) Table 13b.

For the *Educational Manager*, managerial practices are facilitated and mobilised not just for educational ends, but also for the sake of efficiency, advancement, enhanced accountability and, in some contexts, for profit. Seeing the power available to them through hybrid subject positions, rather than outright reluctance or mere pragmatism, these individuals are more proactive in their

conformance with and performance of the managerial demands placed on them. Interviewee C13 illustrated these benefits and his own identification as a hybrid, in the comment that:

“At least, if you are in the [Board]room, you can contribute to the conversation, you can push an educational agenda; because otherwise it’s lost. If business people are making decisions and if you can’t challenge them on their terms, they are missing huge elements of what a school should be. So you really do need to blend the two perspectives. My role is to bring that blend” (Interviewee C13)

Without the conflict inherent in the previous positions, Interviewee C13 is clearly comfortable operating across managerial and educational domains; as he added: “the better we perform as a business, the better for the kids”. Thus, while the touchstone remains educational purpose, *Educational Managers* seem to embrace the potentials of managerialism:

“...we are for-profit but I constantly remain staff that [the owner] has never taken any money out, she is in it for education. We are in a competitive market though so I do remind them of our responsibilities. I remind staff about appearance, about marking, about presentation, about corridor displays and such – this stuff matters, especially to parents and especially to the owner.” (Interviewee C20)

In this quote, the different discourses are leveraged equally; there is recourse to educational purpose (marking of student work) *and* to managerialism (implicitly to marketisation). Moreover,

there is also evidence of power. There is the clear intention by Interviewee C13 to use the power of marketisation to correct the action of teachers; teachers are being governed into certain ways of dress (appearance), justified because “this stuff matters”. Thus, while remaining fluid, for *Educational Managers* an ontological shift has occurred that opens up new and empowering subject positions; managerialism is no longer an incidental occupational demand, where it can be seen to serve educational purpose it is (becoming) part of the manager-subject.

5.6.3.5 The Educational Executive

Lastly, *Educational Executive* subject positioning demonstrates a much greater extent of ontologically ‘blended hybridisation’ (Greenwood *et al.*, 2011:352). While not wishing to abandon the results of the work done to claim educational subject positions, these hybrids had a simultaneous capacity to find their way into, and to relate to, plural alternates. These Heads identify as managers and are comfortable with managerialism.

Distinguishing this position from the *Educational Manager* (above), ontologically, blended hybridity is not something that is *embraced* it is something these Heads *are* (albeit changeably so). Importantly, this positioning is achieved not necessarily in order to further educational purpose but is resultant of the subjugating effects of succeeding in institutionally complex situations. So normalised has *conformity* to management requirements become that these subjects have been disciplined, through discourse, into managerial subject positions.

In contrast to the reluctant manager-professionals in other contexts (*cf.* Waring and Currie, 2009; McPherson and Sauder, 2013), *Educational Executives* do not simply opportunistically use managerial or commercial practice (i.e. practices tending towards the right of Table 13a) as tools for negotiating demands, this being more representative of pragmatism. These Heads have come

to *identify* with subject positions where managerialism is seen as part of the professional discourse and not outside of it (to the right of Table 13b). The *Educational Executive* is not simply willing to mobilise alternate discourses, these discourses are an extended, embedded and integral part of their professional identity. Interviewee C21 neatly summed up his own identification in this regard:

“I don’t think it’s a continuum, because if you do the job right, you’re both. I think if I had just one or the other I would get bored and wouldn’t feel fulfilled – I need both. I want the chalk dust under the fingernails, and I thrive in that, but if that’s all I was doing, I might not get the same sort of challenge from the management stuff”
(Interviewee C21)

A further particularly rich example of *Educational Executive* identity work (as opposed to merely the pragmatic adoption of management practice) was Interviewee C15. Head of a large and successful not-for-profit school, Interviewee C15 was passionately educational: “personal success for me is still being excited every morning about coming to school, still wanting to be amongst the kids, still wanting to drive learning”. At the same time, he proudly positioned himself as managerial in his thinking:

“Well, no better book has been written on school leadership in the last 30 years than [Jim Collins’] ‘Good to Great’, as far as I can see. As a result of that book I have brought in performance management criteria that is [sic] very tight. Very tough. It’s not about getting rid of the deadwood, it’s replanting the tree; getting the right people on the bus”. (Interviewee C15)

This exchange is particularly telling in the way managerialism is defined. Apparently unaware of Gray and Streshly's (2008) text, Interviewee C15 seems to have undertaken a very similar application of 'Good to Great' to education. Indicative of the space between both Tables 13a and b, Interviewee C15 articulates the *practices* of 'Good to Great' in educational terms, declares his own *identification* with them and encourages his senior managers to follow suit. Performance management for Interviewee C15 is about asking, "Can this teacher do better, can I get more performance out of them?" (a managerial stance) but its purpose was ultimately "to get the very best for the students" (an educational stance). This discursive move constructed a personal motive based on organisational mission that eschewed performance for its own sake, enabling an adoption of managerial thinking which works with not against educational goals. For Interviewee C15 hybridity came very naturally, he may not have had the job title CEO but he was adept at strategically using every discursive resource at his disposal – educational and managerial.

In summary, the *Educational Executive* demonstrates not only a willingness to engage in practices alternate to the traditions of professional educator, but also a degree of subjectication through managerialism. This subject is rendered as a manager, identifies with management and draws power from that identification. As Currie *et al.* demonstrate in their study of medical professionals, identity work for powerful actors such as these relates to the professional dominance, status, protection and validation which they receive from the profession; here those actors (Heads) identity as managers in ways which 'enhance, not merely maintain, their position' (2012:957). Importantly, this identification does not come at the expense of education, this subject sees education and managerialism as complimentary, experiencing subjectication through plural discourses.

5.6.3.6 *The Outlier*

To demonstrate the non-exclusivity of these various subject positions (as suggested, the view that subjects move contingently between these positions dependent on context, life history and occupational skill) Interviewee C10 provides an interesting final reference point.

Interviewee C10 was the most challenging of all the interviewees. He is a long-standing Head of a group of for-profit schools; at the time of interview, he was also Chair of a major international school federation. Despite splitting his time between several schools and despite claiming to have “a very good understanding of the corporate side of things”, at the very outset Interviewee C10 challenged the relevance of his CEO job title:

“Let’s not mistake what I do, I am the Principal, I don’t use CEO. It might say it on formal documentation but I use Principal.” (Interviewee C10)

At first glance, Interviewee C10 might appear to be an incidental hybrid, a *Head-Teacher* perhaps; certainly, his outward identity work was strongly educational. He negated and refused any sense of identity encroachment and seemed to be (aggressively at times) responding reactively to expanded professional obligations:

“Name me one [management task] that I’m going to be out of my depth on - to just turn it back around - that requires somebody I can’t have working for me and means that I can’t be the leading educationalist” (Interviewee C10)

Interviewee C10 wanted to be seen as an educator and, as the rejection of his CEO job title attests, was forceful in his assertion of this position. At the same time, he was very aware of the power (particularly over staff) managerialism affords him:

“The not-for-profits can be very inefficient; they waste money on facilities they don’t need, they pay their staff more than they need; they waste money. Here things are more efficient, I make sure they are – and I make sure staff know that.” (Interviewee C10)

He also wouldn’t countenance any suggestion that not having specific business skills might affect his ability to perform the role or might erode his power:

“My skill is managing people, no matter who they are or what they do; corporateness [sic] is a tool for the clever educationalist, not education a tool for clever corporate people.” (Interviewee C10)

Interviewee C10 believed that the status of Headship affords him the authority to bridge educational and management worlds, without needing to be fully expert in either (“I can’t teach A-Level Economics, but I can manage Economics teachers...why should accountants be any different?”). The type of hybridity being performed here is very different then to any one of the subject positions described above. Interviewee C10 is undoubtedly a hybrid, arguably demonstrating strong tendencies towards ‘Executive’ positioning. This is not, however, a position he self-identifies in/as. Nor though is his positioning incidental. It was very clear that Interviewee C10 willingly and knowingly drew power from his ability to converse and perform across multiple

discourses (“that’s not anti-education, it’s just business”). Interviewee C10 might be best described as occupying *both* poles of the continuum *and* simultaneously so – he is not one type of professional but many. What Interviewee C10 exemplifies is that hybridity is not simply *either/or* or even *both/and*; hybridity represents an individual’s responses (plural) to relationships of power between contingent discourses and results in identity work that can, and often is, full of tension, (inner) conflict and contradiction.

5.6.4 Identification of Hybrid Subject Positions

Through the analytics of Tables 13a and b and through the literature on which this theorising is based, Table 14 summarises the subject positions described above. Note that, although useful in the descriptions above, the *Outlier* is not included in the table; by definition the *Outlier* sits beyond and across these positions.

Table 14: Types of Identity Work/Discursive Subject Positions Adopted by Heads

CATEGORY	EDUCATOR		EDUCATIONAL MANAGER		
RELATIONSHIP TO MANAGERIALISM (THEORY)					
HYBRIDITY McGivern <i>et al.</i> (2015)	Incidental	Incidental	Willing	Willing	
	Passive professional obligation	Reactive professional obligation	Fruition of formative hybrid identity work		
HYBRIDITY Emirbayer and Mische (1998)	Habitual/Refusal	Projective	Practical-Evaluative	Projective	Habitual/Open
INSTITUTIONAL WORK Lawrence <i>et al.</i> (2009)	Either/Or Approaches		Moderation	Both/And Approaches	
IDENTITY REGULATION Collinson (2003)	Resistant		Dramaturgical		Conformist

Table 14: Types of Identity Work/Discursive Subject Positions Adopted by Heads (cont)

RELATIONSHIP TO MANAGERIALISM (EMPIRICS)					
RESPONSE TO MANAGERIALISM	OCCUPATIONAL			OCCUPATIONAL AND ONTOLOGICAL	
		Refusal Negation, Contestation	Reluctance, Alternation, Segmenting,	Pragmatism, Moderation, Accommodation	Opportunism, Co-option, Facilitation
DOMINANT IDENTITY WORK	PRACTITIONER			MANAGER	
	Teacher-Head	Head-Teacher	Pragmatist-Broker	Educational Manager	Educational Executive
DISCOURSE/S	Educational	Educational	Educational Administration	Education and Management	Management, Education and Business



Taking the table top to bottom and left to right, firstly, identity work is presented as broadly grouped under two categories: *educator* and *educational manager*. Important here is the avoidance of reference to professionalism (and especially to binaries such as professional educator or professional manager). Both *educator* and *educational manager* are forms of professional behaviour, neither being privileged or given preference. What these terms reference is *how* an individual identifies with professionalism.

Secondly, the work of McGivern *et al.* (2015) has been summarised with regard to how different types of identity work describe an individual's relationship to managerialism; those who identify as educators relating to managerialism only incidentally (as passive or reactive professional obligation) on the left, those identifying with managerialism (as a result of formative identity work) on the right.

This relationship is further illustrated through the work of Emirbayer and Mische (1998). At one extreme, *educators* seem to adopt habitual tendencies towards educational norms, refusing identity encroachment. At the other extreme, *educational managers* are equally habitual but

here it is managerialism that has become habitual; these individuals identify as managers and are open to new ways of managing and new forms of managerialism. Sitting in between these extremes, other individuals use varying degrees of practical-evaluative strategies to reflect on how plural demands affect their sense of self; these reflections being projected away from the self and segmented to others (“I don’t do that”, Interviewee C12) or projected onto self (“I need to learn to be more like that”, Interviewee C3).

These themes are reiterated in the work of Lawrence *et al.* (2009) who separate how institutional actors deal with complexity as *either/or*, *moderation* or *both/and* approaches. Within the table this translates as identity work as an educator *either/or* as a manager, moderation of those two positions, or adoption of both (educator *and* manager).

Finally, the table highlights how identity work relates to managerialism via Collinson’s (2003) three types of employee subjectifications – resistant, dramaturgical and conformist selves.

In its lower half, Table 14 highlights the important distinction between *occupational* and *ontological* hybridity; a distinction which is underserved in previous literature. Building on the work of McGivern *et al.*, but with slightly different analytical emphasis, the argument here is that passive, reactive and reluctant hybridity is first and foremost an *occupational* response. For these individuals management practice is seen as essentially incidental to educational identity and managerial thinking hardly adopted, if at all. These hybrids may be perfectly capable of performing the range of administrative tasks required of them, and, as they move towards moderation, management may be adopted and utilised for pragmatic benefit (personal and organisational) but at the level of identity it remains *either/or* – the individual *does* management without necessarily wanting to *be* a manager. Importantly, the suggestion here is that this makes the individual no less hybridic; they are simply hybridic at the level of practice.

In contrast, other Heads are also hybridic at the level of self (ontologically). As in Kippist and Fitzgerald's (2009) study of clinicians, these individuals see no (or less) conflict between themselves as *both* practitioner *and* manager. None of these Heads had abandoned an educational identity entirely in favour of a managerial one (had they done so it would be arguable that this represented a shift of poles and not hybridity), however, some do identify strongly as managers and *do* management (and embrace managerial thinking) as a result. For a number (those categorised as *Educational Managers*) this may be a 'skilled manipulation of self, reputation and image' (Collinson, 2003:538) in the eyes of significant others (including the interviewer); in other words, performances *of* managerialism. For others though (the *Educational Executives*) these performances are not forced or false but are (or have become, through repeated performance) part of the individual's ontology.

5.6.5 The Benefits of Hybridity

As described above, Heads can (and do) experience contingent subjectication as hybrids through the influences of educational and managerial discourse. For some, the power effects of educational subjugation hold the most appeal; managerialism having influence only via occupational necessity. For others, the disciplining potentials of managerialism are ontologically meaningful. Most Heads seem to find a balance between these positions. By, for example, defining himself as "in the business of education", Interviewee C10 is arguably seeking to identify credibly and non-marginally with the educational world, and at the same time, seeking similar credibility with other more corporate audiences (perhaps the school owners). However, regardless of the form of hybridity achieved – occupational or ontological – it is argued that the self benefits.

The benefits of hybridity help to explain why, despite limited functional or economic need, the languages and practices of business are finding their way into the professional conscience. Even Heads who identify as educationalists, performing management through occupational necessity, must adopt its languages and practices if they wish to be successful. The extent to which those practices bite may be equivocal, but the ability to *do* management, whether only occupationally or also ontologically, is both necessary and a source of professional power.

To illustrate this point, as Hoyle and Wallace suggest, the explicit use of ‘management speak’ (2005:10) such as ‘vision’ and ‘strategy’ evidences take up of managerialism. Whereas Heads undoubtedly need the ability to turn visions into reality, in many schools the ‘vision’ itself is pre-defined (by the Board, by legacy, by history or by circumstance). Indeed, it is both a cliché and a truism that the classroom of today is largely as it was 100 years ago – not something that can be said of many markets. Vision, therefore, as applied to education, is a misnomer. Yet, the data suggests that ‘visionary’ and ‘strategic’ thinking are in high demand (these terms appeared 132 and 131 times respectively in the recruitment documentation). These terms have been discursively normalised within the profession. Claiming Headship as visionary and strategic, no matter what the functional need, enhances a Head’s credibility; the Head is no longer *only* a (Head) teacher, they are now a manager – and a manager with vision nonetheless. Such is the power and legitimacy of managerialism, that to suggest that a Head does not need ‘strategic vision’, despite its questionable relevance, is tantamount to heresy. As Courtney and Gunter note, ‘the normality of vision in the policy, researcher and professional lexicon, and its need to be spoken and used makes any critique problematic’ (2015:402).

Indeed, in making the argument above, I am well aware that many of my colleagues would contest this view. My counter, drawing on Foucault (1988), would be that the network derived cognitions that have constructed the discourse of ‘vision’ work to govern what is thinkable (and unthinkable) – only when one deconstructs this discourse, as attempted in this thesis, is its power revealed. I am not denying that Heads need to be able to think strategically but strategy for most schools is narrowly confined, and is often operational (the *use* of technology, for example) rather than disruptive (the adoption or invention of radical *new* technologies).

Thus, while ‘vision’ and ‘strategy’ are terms more readily applicable to the corporate world, hybridity paves the way for them to be co-opted by Heads seeking to retain educational and managerial credibility. Interviewee C14, for example, identified herself very much as an educator (indeed, she had returned from a non-school based management post to Headship as a result of this identification), she was, however, perfectly able to use managerial language:

“Vision has to be more than a mission statement on the wall; that’s for accreditation, frankly. The Head needs to be a strategic visionary, deeply believing in the vision so they live and breathe it every day” (Interviewee C14)

In adopting these terms, Interviewee C14 gains benefit from being able to talk the managerial talk. She retains her educational identification, but benefits from her ability to *do* managerialism.

In spite of this, there is more at work in Interviewee C14’s comment than the simple *use* of language. Not only is Interviewee C14 able to use these terms occupationally, she is also revealing the disciplining influences of managerialism. Subjugated by the appeal of managerialism (Heads must “live and breathe” the vision), Interviewee C14 has adopted these terms as part of her

identity work as she seeks to establish legitimacy across multiple subject positions. She benefits occupationally from their use but, in so doing, comes to believe for *herself* in their value. The hybridity she achieves by doing so yields professional and personal benefit; she successfully performs the role of Headship and avoids identity conflict by accepting, albeit subconsciously, new subjectivities. In these terms the benefits of Interviewee C14's hybridity are not just occupational, they are also ontological. Managerialism may be seen to be disciplining this subject within managerial imagery but those influences also empower her as a manager. While such disciplinarity is the topic of much critique, not least of which for authors considering the impact on Heads failing to be visionary or teachers falling outside of the vision (the aforementioned work of Courtney and Gunter, for instance), the authorising properties for the *manager* are often overlooked. Hybridity shows how these properties can be embraced whilst retaining educational identifications.

Adding further weight to this argument, when one considers the lack of specificity with regard to the type of business skills actually required by Heads (see 5.3), support is found for the premise that, rather than being required by occupational demands, Heads are discursively constructing the requirement for business acumen through the benefits to be found in hybridity; an assertion echoed in these comments:

“I don't actual do much of what you might call 'business' but knowing what is going on, and being comfortable in both worlds, strengthens my hand in all sorts of ways”

(Interviewee C9)

“In what I actually do? No, not much what you might call business. But you’ve got to be able to talk to these people [Boards, school owners] in their own language, they’ll respect you if you do; so, yes, there is that side to me”
(Interviewee C16)

Significant is that both of these interviewees work in not-for-profit schools. For these Heads the need for (what they see as) ‘business thinking’ has not come about because of commercial pressure (or at least not because of commercial pressure resulting from a for-profit motive). Indeed, if the need was for specific *business* skills, one might expect more Heads to know and understand a greater range of business tools, something the online questionnaire found not to be true.

As previously suggested, reference to business can then, in these cases particularly, often be better read as managerialism. Heads don't (necessarily) do “much of what you might call business” but being apply to *act* and *be* managerial “strengthens [their] hands in all sorts of ways”. Thus, the contention is that hybrid subject positions that bridge, blend and balance educational and managerial discourses afford Heads enhanced authority and power. That is not to say that managerialism is not beneficial to schools, on that matter this thesis takes no position, rather that it may be adopted, regardless of context, because it facilitates an enhanced sense of professional self.

At a theoretical level, acceptance of these benefits to hybridity requires, of course, that one take the epistemological position outlined in the literature review. That is, a position where the subject is immanently connected to discourse, as embodied and inculcated through discourse, but also with the capacity to (discursively) reflect on this condition. In other words, Heads do not

have to be at one extreme or the other, educational *or* commercial, and nor are they simply subject *or* agent, they can be many things at once. Each of the subject positions suggested in 5.6.3 is, therefore, seductive; each reifies the subject, enabling successful occupational performance within ontological terms. By claiming identification with or against managerialism, whilst simultaneously undertaking its occupational demands, the non-marginal hybrid subject is able to navigate plural institutional (organisational and professional) contexts. The individual can *do* management without wanting to identify as a manager, or they can be a manager and *do* practice as context requires.

In summary, through hybridity Heads gain power, status and legitimacy in terms of how Headship, and their enactment of it, is presented to different audiences: within and between Heads, within and between colleagues and the wider community, and within and between work and non-work domains of an individual's personal identity. By engaging in particular forms of identity/institutional work Heads are not only playing to a preferred version of their own self, but also to and within the broader social context of Headship. Hybridity helps Heads to navigate the inherent uncertainty and ambiguity of what Headship (now) is and what Heads (now) must be able to do. They can maintain traditional authorisation and legitimacy (in their own eyes and in the eyes of others) while also taking on new identifications.

5.6.6 Barriers, Resistance and Performance

While hybridity may offer benefits, becoming a hybrid is not necessarily a straightforward process. Although all of the Heads studied adapted, to varying degrees, to *occupational* need, there was also evidence of reluctance and refusal to identify with managerialism *ontologically*. A typical avenue for displays of dis-identification was the strong feeling that the aims and

objectives of managerialism were, on occasion, in direct conflict with a Head's own sense of *self-identification*:

“I'm supposed to make a profit, but I don't want to make too much. I want to see that the money is going to the kids before it goes into somebody's pocket” (Interviewee C2)

“When you are feeling pressured because the owner is not getting the cash flow they want, I often think, “Really? Is this what I am in it for?” (Interviewee C8)

In both of these examples, the personal pronoun is significant – “Is this what *I* am in it for?” Evident here is self-reflection against the subject's sense of preferred identity. Where context requires that an individual undertake managerial tasks, the individual reflects on (and here questions) whether the task 'fits' with their sense of self. This reflexivity is the terrain of identity work.

Made real through its subjectication, the subject is reluctant to give up its identifications, and will work hard to disassociate or moderate (and perhaps accommodate) new subjectivities. The individual performs identity work that negotiates dominant and subordinate discourses. In, for example, Interviewee C19's reference to “living to fight another day” (see 5.6.3.3) he is careful to position his dis-identification (with the managerial elements of his role) so as to not jeopardise the hard work and self-positioning that earned him identification with Headship in the first place. He is resistant, up to a point; that point being the fulcrum of his ontological desire to retain the social and self-esteem benefits of education *and* management (i.e. Headship).

Notably, these moderations are not limited to commercial/for-profit contexts. They may be, in some locales, *magnified* by these factors, but the need for identity work exists alongside and not because of context. Indeed, some not-for-profit Heads described very similar tensions with regard to the adoption of managerial practice as their for-profit peers:

Not-for-profit context:

“We have a very complex Board structure here; parents, local representatives and lots of business types. They push the school hard, it’s hard work. We are not-for-profit but when your Board Chair is the CEO of [company] that brings with it all sorts of business thinking. Some helps, some I hate” (Interviewee C16)

For-profit context:

“I know there is concern [amongst staff] about where the money goes. We have gotten much tighter on performance criteria and on salaries recently...that doesn’t worry me if we see the benefit, but I don’t want to just see money going into the owner’s pocket if the school suffers”. (Interviewee C11)

As was found by Spyridonidis *et al.* in their study of medical physicians, what seems to matter is the extent to which such practices can be accommodated within the (educational) professional conscience. Regardless of context, what seems to matter is perception of purpose. Where managerialism has more benign (indeed even positive) implications, its discourses are less resisted; that is, they fit with educational purpose and thus fit with the traditional identity work

of school Heads. In contrast, in contexts where there are questions, concerns and reservations over the *intent* of managerialism, Heads more readily resist its influences (for their schools and for their selves)⁵⁵. Performance-related pay, for example, can easily be accommodated within the professional conscience where it is linked to educational effectiveness, less so where it is linked to financial efficiency:

“[Head Office] has talked about performance related pay. We have never managed to agree on it though. The Heads all want to drive excellence but the corporate view of excellence is different. Until we can agree a model that achieves educational and financial aims it won’t happen, despite what [the corporate office] say” (Interviewee C5)

The strategic and resistive nature of Interviewee C5’s identity work is clear, appearing for him at the boundary of educational and managerial purpose. He will adopt PRP if it rewards excellent teaching but not if it rewards some other (unstated) corporate view of excellence. In addition, his statement “it won’t happen” is indicative of the power he feels the position of Headship (and, perhaps, the associated discourses of education’s moral superiority) affords him – it is also indicative of a *policing* style of institutional work (Lawrence and Suddaby, 2006). This power may be perceived, derived only through fluid, contingent and contested discourse, but that makes it no less ontologically real for Interviewee C5 as he performs his identity work; by drawing attention to relations of power he feels powerful (at least within the safe and secure confines of an interview!).

⁵⁵ While purpose and the specificity of context (rather than broad category of ownership) seems to have the most bearing, these observations do help to explain the marginally greater adoption of managerial practices in not-for-profit schools. This observation is explored further in section 5.6.7.3.

Other Heads raised fewer barriers and were more political in their performances. The benefit that Interviewee C11 (above) sees in performance criteria and tighter salary control may be a functional response to his for-profit context, but, as a pragmatist, he is evidently willing to strategically position himself within the discourses according to shifting political (and personal need). Operating at a similarly politically savvy level, Interviewee C19 suggested that he performs different identities to different audiences:

“I walk the walk, but there are different walks you know. I talk to my teachers differently than I talk to my Board, and differently than I talk to the owner.” (Interviewee C19)

These kinds of ‘facework’ (Goffman, 1959, 1967), where compliance is demonstrated by the adoption of languages, behaviours and practices complicit with alternate discourses, are not inauthentic rather they are methods of performing identity that leverage discursive hybridity and harness power. There is, however, also something more than just fabrication, more than just ‘walking the walk’, occurring in the purposeful enactment of roles that conform to the expectations and limits of a discourse offering control and power. These performances are also performative (after Butler). With educationalists required to be ‘passionately engaged [in their work]’ (Hargreaves, 1998) the potential exists for the projected ‘me’ to subsume the ‘I’ of self; the actor *becomes* the act. The adoption and repetition of behaviours, language and material gestures of managerialism, even if inwardly resisted, disciplines particular subjectivities.

After Foucault, hybridity can be seen, therefore, as an artifice created through performance. The technologies by which discourses invisibly control a subject also construct that subject’s reality through their own participation (Foucault, 1980; Ball, 1990). Resistance, if not quite futile, potentially offers little more than the illusion of self-protection; over time resistance weakens

and the barriers fall; through repeated performance the practitioner *becomes* the manager. Perhaps as the softening of Interviewee C7's "selling one's soul to the Devil" stance evidences, the Self finds itself slipping into new professional modes and into acceptance of a hybrid professional conscience.

5.6.7 Becoming a Hybrid Manager

Of further interest is why certain Heads and not others are subjugated to greater or lesser extents by particular discourses (and not others). Are there catalysts in context or biography which suggests subjectification reifies in differing ways?

Addressing this question, the research considered whether any variables observable in the data might point to why and how some Heads become manager-hybrids and others less so – those variables being commercial context, job title, qualifications, tenure and school size. These variables in particular were chosen because they emerged from the research as interesting data or because it made empirical sense to consider them; whether a Head's qualifications affect hybridity being, for example, a seemingly obvious line of analysis. These variables and the relationship to hybridity are set out in Table 15. Importantly, it is worth reiterating that, as above, the suggestion is not that these descriptions represent discrete profiles, with each Head identifying (and operating) as only one type; rather, the table is an attempt to analyse the variables that might cause or facilitate the type of identity work which constructs the practitioner- or manager-hybrid:

Table 15: Factors Affecting Type of Hybridity/Subject Positioning⁵⁶

SUBJECT POSITION	EDUCATOR			EDUCATIONAL MANAGER	
Dominant Identity Work	PRACTITIONER			MANAGER	
	Teacher-Head	Head-Teacher	Pragmatist-Broker	Educational Manager	Educational Executive
Typical Headship Tenure	Early Career	Early Career	Mid-Career	Established	Late Career
Head's Qualifications	Teaching Qualifications and Masters Degree (in Education)		Teaching Qualifications, Masters Degree (in Education) and/or Professional Headship Qualifications	Teaching Qualifications, Business Qualifications and/or Doctorate	
Commercial Context	For-Profit	For-Profit	No Correlation	No Correlation	Not-For-Profit
Typical Job Title	Head/Principal	Head/Principal	No Correlation	No Correlation	No Correlation
Likely School Size	Small	Small	Mid-sized	Large	Very Large



5.6.7.1 Length of Tenure

As was found by Spyridonidis *et al.* (2015) in relation to medical professionals, length of Headship tenure does appear to be a factor in hybridity. Heads with longer experience in senior management positions tended, overall, towards more *educational manager* and ontological hybrid positioning. The longer an individual spends as a school leader the more the demands of fluidity, multiplicity and contingency seem to affect identity work. Subject to (Butlerian) performative influences, the longer a Head has been a manager the greater the extent to which they are disciplined, occupationally, to management practice and, ontologically, into managerial positions.

Over time, Heads come to identify with more than just teaching. As their role shifts from teaching to management, and as the discourses through which their subjectivities are governed also shift,

⁵⁶ Note that 'correlation' is used here non-statistically; in keeping with the qualitative methodology underpinning this thesis the extent of 'correlation' between a variable and hybridity can be read as an interpretation of the sense (my own and that of the interviewees) that emerged from the various data.

managerialism becomes more easily accommodated. As noted, contrary to Dent and Whitehead (2002), argued here is that the manager is not necessarily managerial but that experience in management roles does seem to be constitutive of managerial identifications.

Supporting this argument, early career Heads tended to identify more as *practitioners* than as *managers*, perhaps unsurprisingly given that they have likely only recently moved up from a relatively teaching-centric post. This observation does not preclude educational discourse from remaining the touchstone throughout a Head's career; no Head in the study, whatever their length of service, had wholly deserted their educational Self in favour of a more managerial one. However, longer term experience as a Head (as a manager), and longer term exposure to the seductive influences of managerialism, does seem to have constitutive effects. Interviewee C9, with 20 plus years of Headship behind him, demonstrates this particularly aptly:

“What’s really important to me is that I don’t want to become too business-minded but I do want to be in a position to use business practice to drive the performance of my teachers. The business side of things give me a kick” (Interviewee C9)

It is evident in this comment that Interviewee C9 still sees himself (and wants to see himself) as an educator. However, he also recognises the potential of “business practice to drive” (note the managerial language) the performance of his teachers. Despite his long experience as a manager, he has not lost his educational identity, though it has been added to; the validating effects of managerialism do seem to have proven alluring. Over time, as this example shows, the subject becomes increasingly governed by the relations of power they capture, managerialism is no

longer resisted, resented or moderated, it is embraced, relished and, its seductive “kicks”, sought after.

5.6.7.2 Qualifications

Qualifications also seem to have some bearing on hybridity. Heads holding management qualifications (MBAs and the like) seem to more readily adopt manager-hybrid subject positions than those with more educationally aligned Master’s degrees.

Given the lack of requirement for specific business skills, maybe though it is not the qualification itself that matters but the mere fact that the individual was minded to take that qualification. Management qualifications may simply reveal the individual’s preferred identity and/or their openness to new identities. In selecting an MBA over an MA, for instance, a choice has been made about the type of subject a Head wishes to be/be seen as. Management qualifications are by no means a prerequisite to *educational manager* subject positioning, but Heads choosing to undertake MBAs may be aware (perhaps sub-consciously) of the power to be gained from managerialism – as Interview C19 put it, there is recognition that the ability to walk different walks is empowering. Additionally, according to the recruitment consultants interviewed, management qualifications are becoming increasingly popular amongst aspirational Heads. If holding a management qualification is a predictor of hybridity then the popularity of these courses may be evidence that senior leaders are hearing the institutional talk, and that they want to learn to walk the institutional walk. Identification as a manager may be secured through longitudinal exposure but it would seem that aspirational Heads are finding and embracing ways to accelerate the types of identity work which construct the required subjectivities.

5.6.7.3 Context

While the focus of this study is Heads and not context, it is pertinent to briefly consider whether and how context comes to bear on a Head's identity. Does experience in particular types of schools (most obviously not-for-profit, for-profit and corporate) construct particular subjectivities?

Revealed across the various data sets, there is only a weak correlation between context (whether the Head currently leads a for-profit, not-for-profit or corporately owned school) and hybridity. There are, however, some interesting examples and exceptions that prove illustrative.

Interviewee C21 and Interviewee C15, both of whom manage large not-for-profits schools, were perhaps the strongest *Educational Executive* types of all the Heads sampled. Several other not-for-profit Heads also displayed strong tendencies towards *Educational Manager* positioning. This marginally greater adoption of business thinking and managerial practice in not-for-profit schools seems to relate to *both* a greater occupational *and* an ontological willingness of these Heads to embrace manager-hybridity. The not-for-profit Heads seem to experience less identity conflict as they draw on managerialism to further the educational cause.

In contrast, for-profit Heads often (though not always) separated the discourses. As highlighted above (5.6.6), it is perception of purpose which seems to matter. In contexts where Heads described tensions with for-profit owners, the likelihood of identification as an *educator* increases:

“I am the Head Master of this school. I should be the sole and responsible leader – not some guy sitting in a corporate office, with his expensive car in the carpark”

(Interviewee C13)

In contexts where educational purpose and priority is reduced, it is also more likely that Heads conduct institutional work which polices educational morals. For example, combining institutional and identity work, Interviewee C7 worked at *disassociating* herself and the *moral foundation* of a previous school from for-profit motivations, *demonising* the owners as a result:

“I saw it there [her previous school] too many times, that is why I left. You cannot separate morals from education because you’re dealing with people’s children. It is not acceptable to say it’s a business; education must come first” (Interviewee C7)

What seems to matter is the specifics of *particular contexts* and not contexts *in general* – after all, whether for-profit, not-for-profit or corporate, the demands of each school are unique.

As the comments of Interviewee C13 and C7 illustrate, Heads with negative experiences of for-profit schooling are more likely to resist managerialism and to identify (and to conduct institutional work) as the guardians of educational values. In contrast, Heads with positive experiences of for-profit schools may (Interviewee C2, for example) identify managerially:

“We aren’t at capacity but there is little pressure to grow; the owners understand how growth can damage

the school, our reputation and relationships with parents. That's great but we have, and I guess I mean me, sometimes taken our foot off the gas. So I have started to look at performance, efficiency and areas where we can improve much more. So, yes, I guess I have taken more of an executive position now; less hands and on less firefighting." (Interviewee C2)

Arguably then, *purpose* and *identity* are the related variables, not context. Whatever the particular type of school, if a Head can hold onto (or at least convince themselves, and others, that they are holding onto) educational purpose the governing influences of managerialism are less likely to be resisted and its seductive benefits more likely to be embraced. This is an important observation. In keeping with notions of identity salience (Spyridonidis *et al.*, 2015), hybridity binds around educational purpose; a Head's ontological commitments to education cross-cut, and perhaps even dominate, other professional subjectivities. Where context threatens this identification, where managerial discourse threatens to shift how a Head identifies themselves and how they are identified by others, resistance follows; where context is more benign, where managerial discourse offers a legitimate means to validate Head and school alike, its empowering possibilities are embraced. For that reason, albeit marginally, Heads in not-for-profit contexts seem more inclined to *Educational Manager* positioning.

5.6.7.4 Job Title

A seemingly poor predictor of hybridity was job title. The adoption of corporate job titles may be an indicator of managerial discourse (at a meso-level), but, as section 5.4.6 elucidated, those

effects are denied by the individual. Regardless of job title (whether titled as CEO, Principal, Director or Head) participants seemed to identify across the different subject positions.

The only exception to this was that Heads identifying as *educators* were more likely to have the job title Head/Principal. This is, however, more likely linked to the post than to the individual. Whereas the titles Head and Principal are more frequently used in smaller schools, larger schools attract experienced Heads (in part) through prestigious job titles. As opposed to a correlation between job title and hybridity, the causal factor then is more likely to be experience and not the title itself. Exogenously there may be a correlation between job title and the size/prestige of a particular post and corporate job titles may be indicative of managerialism, but endogenously, in terms of the hybridity produced, no correlation exists.

5.6.8 Hybridity as Institutional and Identity Work

As the literature review hypothesised, data analysis confirms that identity work and institutional work are linked. However, while Lawrence and Suddaby's argument that 'identities describe the relationship between an actor and the field in which that actor operates' (2006:223) is a useful starting point, it perhaps does not go far enough. Extending this work, suggested here is that identity does not simply *describe* the relationship between an actor and the field, rather, identity work and institutional work are symbiotic (actor and institution inescapably intertwined).

This thesis finds and argues that the mutually constitutive relationships between an actor and the field represents the interplay of institutional work and identity work. Encouraged by ontological need, an individual will identify with or against different (intersectional) discourses, thereby performing and constructing both self *and* institution. This is usefully illustrated through the example of *mythologizing*, the preserving of norms by creating and sustaining myths

regarding an institutions history (Lawrence and Suddaby, 2006). While it may well be the case that mythologizing (re)creates or sustains institutional norms, the individual storyteller is not immune from the performative (in the constitutive sense meant by Butler) effects of these stories. The storyteller chooses to espouse particular myths, not only because those myths describe the field but also because, as a form of identity work, they affirm and promote a particular version of Headship (and of the Head's own self), for audience and storyteller alike.

To varying degrees each of Lawrence and Suddaby's forms of institutional work can, I contend, be seen in a similar light; each represents a particular (though not exclusive) technology of self that an individual can adopt as they work at their identity, those same acts also serving to construct the institution. Informed by their particular ontological needs individuals experience subjectification across different forms of institutional work through which, in turn, they come to self-identify. It follows then that the power struggles and strategic moves inherent in different forms of institutional work can be seen as engagement *within* self (between possible identities) and engagement *between* selves (between different institutional potentials). For some this identity work will be sub-conscious and non-strategic. For others it may be a 'skilled manipulation of self, reputation and image' (Collinson, 2003:538); the individual consciously aware of the benefits of hybridity, strategically positioning themselves (occupationally and ontologically) to benefit.

Lawrence and Suddaby's taxonomy is proposed as a device to examine how individuals 'do' hybridity. Their taxonomy can, as attempted below, be used as a heuristic to deconstruct (and allow the researcher to recognise) how hybrid education and/or managerial meanings become assimilated, repeated, stabilised and normalised in and through institutional and identity work. Table 16 offers indicative evidence of where such forms of combined institutional/identity work have been found across the data.

Table 16: Indicative examples of the relationship between institutional (1) work and identity work (2)⁵⁷

TYPE OF INSTITUTIONAL WORK	INDICATIVE QUOTES	EXPLANATION
<p>ADVOCACY</p> <p>Mobilisation of political and regulatory support through direct and deliberate techniques of social suasion</p>	<p>“I have a business manager to manage business, why should I do that? I have more important things to spend my time on. The Head is the expert educationalist and I think the educationalist should have the final say” (IC10)</p>	<p>IC10 advocates for the educationalist to be the prime decision maker (1), whilst also asserting the status of Headship and delegating to others ‘lessor’ tasks (2).</p>
<p>DEFINING</p> <p>The construction of rule systems that confer status or identity, define boundaries of membership or create status hierarchies within a field</p>	<p>“I told them I would turn the school around. If I don’t they can fire me. That’s as it should be. Perform or piss off [sic]” (IC23)</p>	<p>IC23 defines (and normalises) performative rules (1) and affirms his identification with the performative order (2).</p>
<p>VESTING</p> <p>The creation of rule structures that confer property rights</p>	<p>“...if [as Head] I was under pressure to improve ROI for the owner because he wanted to divert money to other businesses I wouldn’t feel comfortable. The investment is the children” (IC3)</p>	<p>IC3 vests interest in the children, and confers ‘rights’ over what type of investment matters (1), while dissociating identification/s with non-educational investment (2).</p>
<p>CONSTRUCTING IDENTITIES</p> <p>Defining the relationship between an actor and the field in which that actor operates</p>	<p>“I’ve always said, “I’m not a marketer here.” I have to market the school, but that’s not who or what I am, nor what I should be doing.” (IC24)</p>	<p>IC24 declares preferred identification/s (2) and defines what roles Heads should/shouldn’t be doing (1)</p>
<p>CHANGING NORMATIVE ASSOCIATIONS</p> <p>Re-making the connections between sets of practices and the moral and cultural foundations for those practices</p>	<p>“I am the Head Master of this school. I should be the sole and responsible leader – not [the] corporate office” (IC13)</p>	<p>The normalising of corporate models of schooling is challenged (1), and the seniority (and identity) of the Head affirmed (2).</p>
<p>CONSTRUCTING NORMATIVE NETWORKS</p> <p>Constructing of inter-organisational connections through which practices become normatively sanctioned and which form the relevant peer group with respect to compliance, monitoring and evaluation</p>	<p>“I understand the real world, because in a real corporate world if you are part of a team that fails or screws up a project, you are fired. For some reason, teachers don’t get that.” (IC23)</p>	<p>IC23 defines teachers as not in the ‘real world’, normalising corporate influences on education (1), whilst setting his identity as distinct from teachers (2).</p>
<p>MIMICRY</p> <p>Associating practices with existing sets of taken-for-granted practices, technologies and rules in order to ease adoption</p>	<p>“Yea, we started that [distributed leadership] a few years back. Has it worked? I don’t know, maybe some. It certainly hasn’t meant any less work for me! But, it was one of those things, you know, something all schools seem to have a go at” (IC11)</p>	<p>Distributed leadership is framed as a taken-for-granted practice (1). The slight diffidence in IC11’s comment indicates a degree of disidentification with the practice (2).</p>

⁵⁷ The left hand column of Table 16 is taken directly from Lawrence and Suddaby’s institutional work taxonomy (2006: 221, 228, 235). The quotes are taken from the data analysis above. It should be noted that ‘Constructing Identities’ is one of the domains of institutional work suggested by Lawrence and Suddaby; here, as noted it is taken that all of the forms of institutional work are mutually constitutive acts of institutional *and* identity work. ‘Constructing identities’ has, however, been included for thoroughness and to remain true to Lawrence and Suddaby’s original work.

<p>THEORIZING</p> <p>The development and specification of abstract categories and the elaboration of chains of cause and effect</p>	<p>“Heads have to be a little bit more malleable, flexible and more chameleon; they have to move with the ebb and flow of their Boards, corporate structures or private owners” (IC5)</p> <p>“Until we can agree a model that achieves educational and financial aims [PRP] won’t happen, despite what [the corporate office] say” (IC5)</p>	<p>IC5 offers, in the first quote, a theory of how the role of Headship is more hybridic (1), yet, in the second quote, draws power from his position to resist corporate pressures (2).</p>
<p>EDUCATING</p> <p>The educating of actors in skills and knowledge necessary to support the new institution</p>	<p>“I have to explain to the teachers that it is the <i>clients</i> who are paying your wages, and they will look at the quality of your marking, how you dress...these things are important, some don’t get it” (IC19)</p>	<p>Use of managerial language to educate teachers (1); and implication that IC19 <i>himself</i> is different to teachers in his understanding (2).</p>
<p>ENABLING WORK</p> <p>The creation of rules that facilitate, supplement and support institutions, such as the creation of authorising agents or diverting resources</p>	<p>“We are in a competitive market though so I do remind [staff] of our responsibilities. (IC13)</p>	<p>Enabling of managerialism via reference to external forces (1), a position which also enables managerial authority for the Head (2).</p>
<p>POLICING</p> <p>Ensuring compliance through enforcement, auditing and monitoring</p>	<p>“You have to say: “I am accountable, I’m responsible for your child”; if you’ve never done that, if you don’t know what it <i>means</i> to put the student first you’ve got no business being a Head” (IC7)</p>	<p>IC7 draws both ontological (2) and occupational boundaries (1) to Headship, policing the priorities of the role.</p>
<p>DETECTING</p> <p>Establishing coercive barriers to institutional change</p>	<p>“I would walk if any sense of commercialism came before education” (IC20)</p>	<p>IC20 deters change (1) by drawing attention to the consequences if identity barriers are crossed (2).</p>
<p>VALORIZING AND DEMONIZING</p> <p>Providing for public consumption positive and negative examples that illustrates the normative foundations of an institution</p>	<p>“Well, no better book has been written on school leadership in the last 30 years than [Jim Collins’] ‘Good to Great’. I make all my senior managers read it”. (IC15)</p>	<p>Promotion of particular <i>practices</i> (1) and/or forms of <i>being</i> (2)</p>
<p>MYTHOLOGIZING</p> <p>Preserving the normative underpinnings of an institution by creating and sustaining myths regarding its history</p>	<p>“You cannot separate morals from education because you’re dealing with people’s children. It is not acceptable to say it’s a business; education must come first”(IC7)</p> <p>“...any Head who works for a for-profit school has sold their soul to the Devil” (IC7)</p>	<p>Framing the profession (and its enactment) as different (and perhaps even morally superior) to managerial discourse (1); through demonizing (above), creation of a myth that any Head who works for a for-profit school is something less than pure (2).</p>
<p>EMBEDDING AND ROUTINIZING</p> <p>Actively infusing the normative foundations of an institution into the participants' day-to-day routines</p>	<p>“You do need knowledge of business; you can’t just be the Head Teacher anymore.” (Interviewee C12)</p>	<p>Infusing normative foundations (1) within Heads role and what they identify as (2).</p>

<p>DISCONNECTING SANCTIONS</p> <p>Working through state apparatus to disconnect rewards and sanctions from some set of practices, technologies or rules</p>	<p>“I’m not against business thinking, we must have business systems, we must have – we can do a business analysis of everything we do. But that doesn’t mean whatever we decide we make the same decision that a business would” (IC7)</p>	<p>Disconnecting Headship from sanctions for those who perform alternate identities (2), thus accepting alternate identities within the institution (1).</p>
<p>DISASSOCIATING MORAL FOUNDATIONS</p> <p>Disassociating the practice, rule or technology from its moral foundation as appropriate within a specific cultural context</p>	<p>“...what I would say is that, in the world we live in, I think the corporate model is the better one for the future. It is the better-informed, it’s the better-connected, and there is more management expertise.” (IC4)</p>	<p>Framing managerialism in morally acceptable terms (1), while suggesting that those who adhere to it might be more ‘expert’ (2).</p>
<p>UNDERMINING ASSUMPTIONS AND BELIEFS</p> <p>Decreasing the perceived risks of innovation and differentiation by undermining core assumptions and beliefs</p>	<p>“...corporateness [sic] is a tool for the clever educationalist, not education a tool for clever corporate people.” (IC10) “I don’t think it’s a continuum, because I think if you do the job right you are both” (IC21)</p>	<p>Challenging the assumption of a managerial-educational dichotomy (1/2). In the second quote, framing managerialism as something to be used (not just accepted or suffered) by Heads (1/2).</p>

Evident in the nuance of these quotes is that these speech acts are not mutually exclusive, both institutional work and identity work are implicated in moments of experience and performance. In the very final quote above, Interviewee 21 might, indeed, be undermining beliefs about the nature of Headship (the institution), but at the same time he is (in this instance perhaps consciously but not strategically) affirming his own status as a hybrid (*identity work*) and, further, also asserting that to do the job ‘right’ hybridity is required (*institutional work*). As such, while the examples above attempt to draw attention to distinct indicators of institutional and identity work, to overstate the demarcation between the two is to miss the point – often these acts are blended and simultaneous examples of both.

For both institution and subject, it is through these acts – *valorising, demonising, advocating* and *mythologizing* etc. - where discourse, whether educational or managerial, bites; that is, where, why and how intersectionality guides institutional and identity work, thereby producing hybrid professional subjects. The micro-processes by which this occurs are best revealed in the transition of role (and hints at identity conflict) described by Interviewee C25:

“My role has changed a tremendous amount, where I don’t feel like a Principal; and that’s not something I want or enjoy. I feel like I am the Business Manager, that’s what the Board want and that’s the way staff see me and, most days, that’s how I act.” (Interviewee C25)

The reluctance inherent in Interviewee C25’s stance represents identity work *and* institutional work. In identity terms, he feels himself becoming disciplined by managerialism into a role he is less comfortable with (“I don’t feel like I’m the Principal of the school”) and, outwardly at least, he resists this identification. His occupational acquiescence (“that’s how I act”) is also though a form of institutional work; where his reluctance *maintains normative associations* with education (identity work) his consent enables managerialism (institutional work).

These ways of talking, seeing and doing may be constituted by the *individual* identity work of each Head as they seek to engage with, or resist, the dominant discourses in circulation at a particular time, but, in the propensity of discourse to construct and not just describe, those actions also inform *collective* (institutional) understandings about what it is that Heads say, what they do, what they should know and how they should act. These performances construct not only Interviewee C25’s subjectivities but also, flowing around globally diverse but ultimately tight-knit international school networks, create ‘institutionalised way[s] of talking that regulate and reinforce action’ (Link, 1983:60). Teachers see Heads acting (or not acting) in certain ways and those acts construct understandings about what counts as professional.

In the example of Interviewee C15 (5.6.3.5), his *valourising* of managerial thinking (“no better book has been written on school leadership [than] ‘Good to Great’.... I make all my senior managers read it”) can be seen to be contributing in an additive sense to what it means to be a

professional educational manager. Observed by other professionals (teachers seeking to rise up the ranks, for example) managerialism becomes validated and normalised, in other words institutionalised, as part of Headship (in both occupational and/or ontological form).

More speculatively, this kind of institutionalism may also have the potential to accelerate the legitimising of new modes of professional behaviour. As noted above, manager-hybridity seems to develop over a Head's career, as they manage larger schools, and as they are exposed to a greater range of managerial demands. However, there is evidence that the performative construction of the manager-hybrid is filtering down to less experienced Heads (and, in turn, to senior leaders). For example, Interviewees C11 and C21, Heads with less than five years of service, are both very managerial – they are already institutionalised and they already perform *educational manager* identity work. Notably, both of these interviewees have more experienced Heads appointed to their schools as 'critical friends' (one of these critical friends also holding an MBA). These two Heads are, arguably, being socialised (and trained) towards manager-hybridity; their subjectivities constructed around the ontological meaning to be gained from educational *and* managerial identifications.

5.7 DISCUSSIONS

In summary, all of the Heads studied can be considered hybrids. Indeed, it is unlikely that an individual could become a Head without being hybridic at least at the level of practice - an observation borne out in the requirements for *management* (as administration) found in relation to RQI and RQII. A Head need not recognise his or her self solely as an *educator*, as a *manager*, nor do they need to identify *managerially*. What each of the case studies (and Table 13b) describes is how subjects identify, as hybrids, through both educational and managerial discourses. For some the disciplinary affects of managerialism, set against those of education,

bite only at the level of practice; *educator* hybrids undertaking management practice only as occupational context demands. For others managerialism holds more seductive appeal, with ontological benefit drawn from *educational manager* identifications. All of the Heads studied though, to a greater or lesser extent, are hybrids.

Critically, and significant for this thesis, these findings highlight that neither occupational or ontological hybridity is the 'better' mode of being (a feature perhaps implicit, if not in the theory then at least in the terminology, of the incidental/willing dichotomy offered by McGivern *et al.*). In the context of this study, with the analytical focus being identity work, refusal does not mean refusal to *carry out* management tasks, it means refusal/reluctance to *identify as* a manager. The occupational tasks of management may be carried out just as effectively, regardless of underlying ontology.

In sum, as professionals experience subjectification through contextually dominant, subordinate and emerging discourses, as they are formed as hybrid subjects, they struggle within their own selves (identity work) and with other selves for professional legitimacy and dominance (institutional work). By disciplining *and* empowering, the properties of hybrid professionalism can be seen as sources of validation and power for the individual identified by them, and as sources of institutional power for the individual authorised by those performances.

Hybridity is not without its risks (achieving it can feel very much like work and hybrid positioning is no guarantee of success), but through hybridity there is the potential to configure non-exclusive, non-marginal, blended and shifting, yet entirely legitimate, identities which cross-cut multiple discourses. For some, *occupational* hybridity, underpinned by salient educational identification, allows access to management positions without the perception of 'selling one's soul'; for others, the vulnerabilities of identifying *ontologically* as a manager can be mitigated by

retaining identification with occupational practice. Hybridity in these terms is a powerful concept, and for the individual professional it offers powerfully seductive potentials.

CHAPTER 6: CONCLUSIONS

This study has sought to critically examine how managerialism affects the identity work of international school Heads; specifically, the identity work of a manager class (Heads) reified through one set of discourses (education) but now also influenced by other discourses (managerialism).

While managerialism has received significant prior academic attention, the rationale for this study was that this attention does not yet extend to international schools. Distinguishing this project from previous works, the international context has been shown to allow for a bracketing out of regulatory-induced managerialism. This has afforded the research a 'purer' view of discourse as a constitutive influence; the muddying affects of identity work as a *reaction* to government diktat filtered (if not quite out, then to one side) by the regulatory freedoms and favourable market conditions enjoyed by (many) international schools. After Peck (2003; in Ball, 2012a:29), managerialism may be 'out there' (regulatory and economic) but this work has found that more (or at least, as) important is the extent to which its discourses find their way 'in here', inside the hearts and minds of educational professionals.

Examination of how and why this might be the case was advanced through three research questions:

- I. What forms of managerialism, if any, are emerging within international schools which might exemplify the antecedents of managerial identities?
- II. Which discourses, educational and/or managerial, seem dominant in the processes of identity formation for international school Heads?
- III. What are the outcomes, in terms of their professional identity work, for international school Heads as they reconcile the plural demands of education and managerialism?

As Chapter 4 described, this study is situated within interpretive traditions. Further outlined was a rationale for mixed-methods research. Based on this approach, the research questions were addressed through three distinct methods, each generating a range of data:

Antecedents In reference to Research Questions I and II, 150 responses to an online questionnaire (the intent being to investigate the prevalence of managerial practice and the extent of managerial discourse in international schools).

Processes Attending to Research Questions I and II, analysis of 100 sets of recruitment documentation for Headship positions in international schools (the intent being to identify the management and managerial responsibilities externally and formally required of Heads). This analysis was also supported by three interviews with recruitment consultants working with international schools (the intent being to sense-check and enrich the recruitment documentation analysis).

Outcomes Addressing Research Question III, twenty-five face-to-face interviews with international school Heads (the intent being to examine identity work, hybridity and the factors which influence how plurality is resolved).

The justification for adopting this approach was that restricting analysis to a quantitative count of managerial practice, whilst relevant and useful, fails to account for the impact of identity work in institutions and institutionalism. That is, it was important that the research methodology was able to account for (acknowledge, discount and/or moderate) the influence of market forces and formal requirements on Heads; bracketing out *reactionary* identity work to these factors thereby providing a clearer framework for analysis of relationships of power between educational and managerial discourse as influences on Heads' identifications.

Thus, based on the finding that managerialism disciplines international school Heads *regardless* of political and/or economic pressures and not directly *because* of those pressures; it has been argued that changes to professionalism are not the (sole) result of external factors (factors ‘out there’). International school Heads may have their genesis in the classroom, but similar to their Western counterparts (although by different means), they are now also being encouraged, cajoled, seduced and governed (in this context, more so by their own identity needs) towards managerialism. This study has, therefore, been an investigation of what is going on ‘in here’; an investigation of the linkages between ‘the personal ‘self’ and the social or discursive ‘personas’ to which they relate’ (Watson, 2008:123). As has been reported, the outcome of this focus has been the vital attention drawn to identity work as a source (and, within the international school context, perhaps the most important source) of professional change.

Epistemologically, adopting *subjectification* (Foucault, 1997) as a theoretical position has been important because it moves the subject away from docility. It has allowed examination of how relationships of power are rationalised by ‘ready, adaptable and agentic’ (Ball, 2013:130) subjects and between sometimes complimentary and sometimes competing discourse communities. How, in other words, identity work plays out in professional form through and against the various discourses (here educational and managerial) to which it is exposed. Foucauldian theory, as used here, was instructive in helping to deconstruct dominant and subordinate discourses, opening up identity work to critical interrogation. However, working with Foucault is not about producing new norms. What use of Foucault allows is a problematising of norms; a disruption of the taken-for-granted and an opening up of alternatives. The implication of this line of thinking has been that Heads might *both* mobilise and be skeptical of managerialism, occupationally and/or ontologically.

Empirically, through data analysis, those possibilities were confirmed as a need to move away from the notion of a pure and singular professional – professional practitioner *or* professional manager - towards hybridity (Croft *et al.*, 2015; Denis, *et al.*, 2015; McGivern *et al.*, 2015). The manager-professional (the Head) experiences subjectification as *both* an ‘educational professional’ *and* as a ‘manager’. Expanding on this (re)emerging academic field, with little currently known about the antecedents of hybridity within education, limited conceptions of the type/s of Head/s hybridity governs and how hybridity is performed, it is here that the study makes its most substantive contributions.

These contributions are important because, with Heads regarded, at least by some academics, as central to school improvement (Oplatka, 2003; Hargreaves and Goodson, 2006; Fullan, 2009; Bush and Glover, 2014), showing how these individuals retain legitimacy across contested educational and managerial terrain is vital to understanding what one must *do* as (practice) and what it means *to be* (to identify as) an international school manager. This makes the outcomes of this study valuable to aspiring and serving Heads, to school recruitment panels, to policy makers developing competency frameworks and Headship qualifications and to academics researching hybridity across various contexts.

This chapter proceeds, firstly, through a discussion of each research question; secondly, through a presentation of the theoretical implications of the study; thirdly, via the identification of future research possibilities; fourthly, through a reflection on the efficacy of the methodology and underlying methods; and, finally, by offering a summative conclusion and closing remarks.

6.0 DISCUSSION

The following discussion seeks to link the research data, the literature review and the key research questions. The intent here is not to (re)summarise the research findings – this has been done in Chapter 5 – rather, the intent is to draw out key themes in relation to each research question.

6.1. RESEARCH QUESTIONS I and II

6.1.1 Research Question I: What forms of managerialism, if any, are emerging within international schools which might exemplify the antecedents of managerial identities?

With the distinction drawn in Table 3 (Chapter 3) between *management* (as a functional requirement of organisation), the more performative nature of *managerialism* and practices associated with *commercialism* in mind, evidence of a general uptake of ‘business-like’ practices within the sampled international schools was mixed.

Within the recruitment texts, the formal requirements of Headship were strongly aligned to education and to administrative requirements. That finding also extends to the online questionnaire. Overall, the relatively limited use of PRP, the absence of harder-edged performativity markers such as forced-ranking and/or quota-based pay systems, the almost entire absence of profit-share, and the lack of knowledge re tools common in the business world all suggest that, in some ways, the management practices of international schooling are not very managerial (and certainly not very ‘business-like’) at all.

However, the ambivalence and equivocation of educationalists towards the hard-nosed corporate concepts of profit and profitability does not preclude managerial uptake in non-commercial form. As the literature review established, practice does not have to be business-like

to be managerial. On this basis, Ball's (2012) observation that managerialism is most readily experienced by school leaders through performance management and through accountability to performance measures does seem to apply to international school leaders (79% of the sampled schools have some form of target-setting in place). Other exemplars include: the widespread use of parent surveys (80% of all respondents), especially as compared to the use of student and teacher surveys (62% and 56% respectively); the differentials between 3-6 year average tenure and 1-2 year contract lengths (shorter contracts affirming managerial authority); the requirement that Heads understand (at least sufficiently to be able to talk credibly about) financial and marketing practices; and the adoption of terminology such as 'Professional Review' and 'Professional Growth' to describe appraisal processes.

In summary, what is revealed is a nuanced, layered and complex story. Strong *business-like* practice is not yet the norm within international schools but these schools are more *managerial* than a non-critical review of practice or job descriptions would suggest. There is evidence that, in similar ways to the experience of educational and public service professionals in Western state education, elements of management practice (as a necessary function of organisation) are being twisted into managerial form (privileging efficiency and output) and that there is the potential for these practices to form the antecedents of important identity work.

6.1.2 Research Question II: Which discourses, educational and/or managerial, seem dominant in the processes of identity formation for international school Heads?

Research Question II established that international school Heads are disciplined as subjects through *both* educational and managerial discourse. On the one hand, consistent with prior literature, the data analysis found that education is bound by a strong 'professional conscience' (Hodgson, 2005:53) which privileges certain ('traditional') discourses and denigrates others, creating strong identity salience (Spyridonidis *et al.*, 2015). On the other hand, neoliberal

discourses do seem to be influencing international school Heads. Unlike their Western counterparts, the subjects of this study may not have been 'reformed by neoliberalism' (Ball, 2013:130; *emphasis added*) but their subjectivities do seem to be formed, to varying degrees, by similar disciplinary potentials. The language of some of the recruitment documentation suggested, for example, that underperforming teachers are not to be supported, developed or even managed (though, admittedly these may all be implicit), they are to be *challenged* – the word invoking a very particular conception of what managers do and the power they should wield. Comparable evidence, and in some instances more straightforward managerialism, can be found in the use by some Heads of terms such as 'clients', 'core business', 'market positioning' and 'competitive forces'. One interviewee even went so far as to refer to education as a 'product'. In the rhetoric of some Heads there was also evidence of the managerial tendency to actively create performative environments, especially where a performance imperative is not a natural consequence of market forces (Ball, 2003b; 2015).

Overall then, despite their regulatory and market freedoms, international school leaders do seem to be (also) governed by managerialism. Adopting the language of Lawrence *et al.* (2009), Headship is not concerned with *either* education *or* managerialism. The processes of becoming and performing as a Head are a complex blend of moderation between the poles, a hybrid mix of *both*. However, in contrast to much of the literature, this thesis sees these influences as subjugating *and* (potentially) empowering. Contrary to Dent and Whitehead's assertion that 'the manager has become professionalised, the professional has become managerialist' (2002:6) the data suggests that managerialism is filtered and moderated through equally powerful educational discourses. Heads may be managers but that does not necessarily require them to be managerialist, nor does being managerial necessarily make a Head any less of an educationalist – there are multiple spaces between the extremes of these disciplinary affects where Heads are constructed.

Given these dual influences, Headship seems to be discursively framed within an occupational and ontological 'space between' management as functional need and managerialism as a privileging of management and of managers. With the ways in which these occupational spaces might be revealed (Table 13a) and how they bear down on/are drawn into ontology (Table 13b) proposed via RQI and RQII, the outcomes and potentials of these influences for individual identity work are explored in Research Question III.

6.2 RESEARCH QUESTION III: What are the outcomes, in terms of their professional identity work, for international school Heads as they reconcile the plural demands of education and managerialism?

Having established that, perhaps more so than external requirements, it is endogenous relationships of power that most readily govern educational and managerial subjectivities, Research Question III considers how international school Heads reconcile these demands in their identity work.

6.2.1 The Educational Self

Despite the influences of managerialism as described above, identity regulation appears to be strong, and educational identifications robustly protected. So dominant it seems is the hegemony of educational discourse and so intrinsic its demands (and rewards), that the educational Self is intensely seduced by and subjugated through its power. In the interviews, all Heads used passionate and emotive language when discussing education, with many expressing an explicit desire to be seen by others (teachers in particular) as emotionally engaged with the children, with their schools, and with education in general. The ontological significance of belonging to the professional order seemingly governs the actions of Heads by enabling (and compelling) them into particular subject positions – notably, subject positions constructed through the need for participants to have pedagogic knowledge, compassion and, above all, a student first motivation.

Drawing on the power of educational subjectivities, Heads declare the moral supremacy of education and position themselves as its guardians. That is, adherence to educational discourse is deemed critically important to professional belonging. Assertions such as “if you don’t know what it means to put the student first you’ve got no business being a Head” (Interviewee C7), and the many others like it, are manifestations of the power of discourse to anchor itself by privileging its referents. The speakers of a dominant discourse can claim to be its arbiters, can claim expertise, and hence can claim authority. These speakers do not, of course, control discourse; they are themselves constructed as its subjects. They are though its standard bearers. As Heads protect and promote educational norms and traditions, discourses unfold across the field, constructing restraints and imperatives which manifest as rules and maxims. These rules determine who has the right to speak (Heads) and what can be legitimately said (education). The narrative of a Head’s self can be seen, therefore, to be situated within a social framework the discourses of which carry intensely normative qualities that bind and empower members through a particular set of values and personae. Produced and subjected (through their own proclamations and those of others) to a ‘forced reiteration of norms’ (Butler, 1993:94), a Head may know that their role is less ‘about the student’ than they claim, but, for fear of being professionally ostracised, they are highly unlikely to admit it.

From this perspective, educational discourses can be seen to make Heads themselves necessary. Who else to protect the educational standard? Who else to determine what is reasonable, sane and proper and what is not? Thus, read critically, the actions of Heads might be seen as less about the higher moral purpose of education (a subjective and discursive claim in itself) and more to do with Heads seeking to protect and affirm collectively held signifiers of Self. Heads seem to agentically use the discourses of education as *self*-justification. Adherence to educational discourses provides Heads with options (and justifications) for identity work that, through the security of the professional collective, offers powerfully validating subject positions which

protect against *self*-doubt and identity encroachment. A number of mechanisms are used explicitly to tie this identity work to professionalism. Most obviously, rather than revealing their identity work as a private and solitary undertaking, the interviewees often referred to education as if it were a thing apart, a collectively cohesive placeholder for the primacy and goodness of Headship.

Yet, as powerful and appealing as educational discourse is, it is not pure and singular. Headship is impure and multiple. As this thesis has established, Heads are required, reluctantly or otherwise, to undertake *management* and they are also being governed by the seductions of *managerialism*.

6.2.2 The Manager(ial) Self

Heads may find strong salience in the discourses of education and they may use its rhetoric to question (within the interviews at least) the morality, value and applicability of managerial thinking, but for Heads who can demonstrate the appropriate techniques, terminology and entrepreneurial acumen, managerialism offers a sense of enhanced ontology. Whilst these influences mean, for many of those interviewed, an *unsettling* realignment of allegiance, technique and strategy, for others managerialism opens up avenues for authorisation and status. Despite governance via educational discourse, it is clear that the equally powerful discourses of managerialism offer affirming and empowering potentials.

Significant in establishing this argument was that, where it was found, managerial practice was present *regardless* of profit motive, not as a result of it. The uptake of managerialism does not seem to be (exclusively) derived from commercial, market or new public management pressures. The data for Research Question III suggests that managerial processes are adopted not (solely)

because they improve schools but also because managerialism *empowers* the subject, and enticingly so. Heads identifying as managers, whatever the context, were afforded the power of managerial discourses. These Heads were able to use managerialism as a tool to discipline staff, drawing on its discourses as a means of justifying management action – “the business context provides a really excellent discipline” (Interviewee C13). Moreover, by contrasting their understanding of the ‘real world’ with that of teachers, managerialism becomes a means by which Heads affirm their knowledge and status. Through managerial imagery, the Head presents her or himself as in control, in charge and in command - *of* their own self and, as enlightened manager, *over* other selves. Little wonder that managerialism is powerful and seductive.

As this analysis suggests, managerialism, and the discourses on which it draws, are not necessarily negative. Plural commercial-educational discourses may result in professional tensions but those tensions can, the research data has shown, be turned to advantage. In the evolving neoliberal environment, managerialism opens up discursive spaces for the strategising self. The subject positions offered by managerialism are appealing because the Head who takes up, repeats, performs and manipulates versions of managerialism is afforded the ability to sustain and enhance positions of professional and positional power. By wielding management power this kind of discursive practice provides ontological priority and existential security to the pro-active manager-subject. Interviewees C9, C15, C21, and C23 who, amongst others, each demonstrated that they have the language, technical skills, aggressive instrumentality and ontological pliability to operate managerially are examples of individuals who are seizing the opportunities of managerialism.

These arguments offer a view of how managerialism is made meaningful. Educational beliefs may be the native discourse but so seductive are the colonising influences of managerialism that its disciplinary potentials also (importantly, not instead) construct Headship around beliefs in the

value of market forces, competition, structural efficiencies and the significance of performance. Heads, who would wish not to be ontologically or occupationally outside of *plural* professional norms, are drawn to the inherent promises of educational *and* managerial protection and validation - as hybrids.

6.2.3 The Hybrid Self

As argued, educational foci have by no means been abandoned, indeed they retain primacy, but they are (now) intersected by other discourses and by other priorities. If such a thing as the pure educationalist ever existed (a doubtful claim) then those days are long gone; the discourses which subject Heads as professionals are multiple. Heads must, it has been suggested, retain credibility as specialists occupying an important classroom-focused (if not classroom-based) role while also performing as managers. Even those Heads who do not actively mobilise managerialism (indeed, even those who frame it as outside of their self-identification), acknowledge its *occupational* presence and importance – they understand the need to *manage* even while resisting its extremes. That is, even while feeling a sense of personal unease, moderating, resisting or refusing elements of managerial *identifications*, a Head may be perfectly willing to perform the *occupational* requirements of management and managerialism.

At the very least then, the simplistic view of two camps – managerial *or* educational – is, as both the literature review and data analysis suggest, overly reductionist. Contrary to work which sees practice and management as opposed (*cf.* Elliott, 1996; Randle and Brady, 1997; Clarke and Newman, 1997), more recent research has shown that what emerges in institutions subject to complex plurality is a kind of bilingualism; a situation whereby two or more sets of practices, values and cultures exist side by side, each invoked, merged or blended as appropriate (Lawrence and Suddaby, 2006).

Extending this argument in relation to identity, it has been shown (epistemologically and empirically) that discourses do not govern individuals into mutually exclusive subject positions; one does not have to identify as an educationalist *or* a manager, one can identify as a hybrid of both. Thus, rather than prescribing a wholesale move away from one form of subjectivity to its opposite (e.g. from educational identities to managerial ones), a more balanced view can be taken where some value is recognised in *both* poles *and*, likewise, at points between those poles. There is, this thesis suggests, value in each position and additional value to be leveraged by hybrid professionals who can *use* multiple and simultaneous subject positions.

Hybridity allows, therefore, for an understanding of how professionals find legitimacy in the dualism between subjugation and agency. It hints at the agentic possibilities of hybrid professionals who find the ability to maintain a sense of professional identity and legitimacy not only in response to the demands of a dominant discourse (here education), but also through reflexive processes that provide a sense of security in the company of other collective audiences with whom they might wish to professionally identify (as 'manager'). Through hybridity Heads gain power, status and legitimacy in terms of how Headship, and their enactment of it, is experienced. Hybridity helps Heads to navigate the inherent uncertainty and ambiguity of what Headship (now) is and what Heads (now) must be able to do. They can maintain traditional authorisation and legitimacy (in their own eyes and in the eyes of others) while also taking on new identifications.

In practical terms, as the data suggests, *how* a particular Head responds to managerialism seems to relate to the salience accorded to his/her educational identification, to their experiences and to perception of purpose. Governed by career history into educational form, no matter what type of school the Head works for, or the job title she or he is given, that individual has experienced prior subjectication as a teacher - an ontologically significant and rewarding undertaking. With

Heads shown to be disciplined by managerialism, but as 'acting, agentic organism[s]' (Callero, 2003:120) also able to moderate those influences, the subjectively important identity of educationalist seems to cross-cut (Spyridonidis *et al.* 2015) and scaffold *hybrid* identifications. The result is that some Heads are hybrids only occupationally; they *do* management without necessarily wanting to *be* managers. Other Heads see themselves as managers (ontologically) and *do* management and potentially embrace managerialism as a result. In other words, occupational and ontological responses to managerialism need not be the same. Heads can successfully perform as a CEO and still be considered (and still consider themselves) professional educators; they can enjoy spreadsheets, metrics and data, identifying as a manager while also still being a passionate pedagogue; or they can perform in the school play, while still holding the Head of Drama accountable to performative targets.

In light of this theorising, and extending the work of McGivern *et al.* (2015) in regard to health care professionals (where it is argued, in their study at least, that only certain types of hybrids represent professionalism), the conclusion here is that all forms of hybridity are representations of professionalism – albeit, perhaps, representations via new/different/alternate ways of enacting the profession. What is argued is that to successfully hold down a management position (for any length of time) the individual must be able to *manage*. An Occupational-Hybrid may frame management practice as essentially incidental to their own identity and managerial thinking may be hardly adopted at all, but this makes the individual no less hybridic; they are simply hybridic at the level of practice – the individual *does* management without necessarily wanting to *be* a manager. In contrast, other individuals are hybridic at the level of self. For some this may be a 'skilled manipulation of self, reputation and image' (Collinson, 2003:538) in the eyes of significant others (in other words a pragmatic response), for others, these performances are not forced or false but (through the Butlerian performative effects of repeated performance)

have become part of the individual's ontology - the individual (now) sees themselves as a manager and *does* management as a result.

Adapting the work of Mangen and Brivot (2014), Kodieh and Greenwood (2014), Blomgren and Waks (2015) and, in particular, McGivern *et al.* (2015), these possibilities seem to govern Heads identifications, broadly, as *educator* and/or *educational manager*. Across these two general categorisations, Heads respond to managerialism occupationally and/or ontologically and occupy the following hybrid subject positions:

Occupationally dominate responses:

| *Teacher-Head*
| *Head-Teacher*

| *Pragmatist-Broker*

Occupational and ontological responses:

| *Educational Manager*
| *Educational Executive*

Importantly, in no sense are these intended to suggest singular and mutually exclusive discursive positions, quite the opposite. These categories represent the *multiple* discursive resources and tactics available to Heads as they traverse complicated and contingent organisational and professional dynamics. Hence, the *Pragmatist-Broker* position sits between occupational and ontological responses. The *Pragmatist-Broker* bridges the more occupational responses of the *Teacher-Head* and *Head-Teacher* and the more managerially inclined ontological responses of *Educational Managers* and *Educational Executives*, brokering managerialism for self and school. Various then, these subject positions are adopted, refused, resisted, embraced and embedded (incidentally and/or willingly) by different actors at different times and/or simultaneously.

These categorisations and subject positions are summarised in Table 17 (with full descriptions of each ‘type’ found in Chapter 5):

Table 17: Types of Identity Work/Discursive Subject Positions Adopted by Heads (Summary)

CATEGORY	EDUCATOR			EDUCATIONAL MANAGER	
RESPONSE TO MANAGERIALISM	OCCUPATIONAL			OCCUPATIONAL AND ONTOLOGICAL	
	Refusal Negation, Contestation	Reluctance, Alternation, Segmenting,	Pragmatism, Moderation, Accommodation	Opportunism, Co-option, Facilitation	Additive, Adoption, Adaption
AVAILABLE SUBJECT POSITIONS	TEACHER-HEAD	HEAD-TEACHER	PRAGMATIST-BROKER	EDUCATIONAL MANAGER	EDUCATIONAL EXECUTIVE
DISCOURSE/S	Educational	Educational	Educational Administration	Education and Management	Management, Education and Business

With the data analysis discounting the influence of job title and qualifications, the extent to which an individual is governed into one, other or multiple of these positions seems to depend on two key factors: length of tenure and perception of purpose.

Addressing length of tenure, the data shows a correlation between tenure as a Head and subjectification through managerialism. The longer a Head has served, the more they have (likely) been exposed to managerialism and the greater the likelihood of their subjectivities being influenced by its discourses. Accordingly, from the perspective of (Butler’s take on) performativity, it could be argued that experience in management roles *produces* the manager subject. Less experienced Heads have this identity work in front of them; only through trial, error and repetition – only through trying out different professional identifications – do they gain a sense of what works, what doesn’t and how alternate discourses ‘fit’ with their (albeit fluid) sense of self. This identity work might involve ontological threats, performance, and fabrication, and it may at times feel very much like *work*, but it is undertaken because the rewards of Headship (ontological and financial) are seductive. As opposed to simply doing management

occupationally, the slings and arrows of cumulative identity work seem to protect long-served Heads from angst, affirming their status and empowering their ontologies through manager subject positions – there may be slings and arrows but there is also the seductive appeal, metaphorically speaking, of outrageous fortune.

Turning to perception of purpose, as was found by Spyridonidis *et al.* (2015) in their study of health care physicians, a school's *raison d'être* matters. In keeping with notions of identity salience, hybridity is scaffold by educational purpose. Where context stresses managerialism at the expense of education and thereby threatens a Head's educational identity, resistance follows. In contrast, where context is more benign, where managerialism offers a legitimate means to validate Head and school alike, it is more likely to govern managerial identifications. It is perhaps for this reason that the data revealed a marginally greater adoption of managerial practice in not-for-profit schools. Managerialism can be co-opted in not-for-profits contexts without the problems associated with for-profit education; primarily tensions about whether the strongly salient 'student first' moral purpose remains intact. For-profit Heads more often resisted managerialism. Their perception of Headship was of a need to *police* their schools and their *selves* from the of implications managerialism.

These arguments show how, at the meeting of poststructural thought and Goffman's (earlier) notion of 'facework' (1959, 1967), educational and managerial discourses govern Heads into particular hybrid performances. These performances are not fabricated and inauthentic, there is no innate 'doer behind the need' (Nietzsche, *n.d.*), no true self putting on a mask of hybridity. Rather, hybridity is itself a set of governed performances through which the Head struggles to find ontological meaning and occupational purchase – the technologies of that governance being identity work and institutional work. The suggestion, for example, that a Head's time is too important to spend on non-educational tasks represents a *policing* of the boundaries of the

profession (institutional work) and also a *valorising* of the hierarchical status of the Head (and thereby identity work). Thus, as shown, if management tasks and managerial identifications can be reconciled with professional purpose, or if indeed professionalism can be enhanced, then a more stable base for ontological and not just occupational-hybrid association is established.

That said, it would be remiss not to highlight that the more ontologically-orientated performances of hybridity are potentially risky undertakings. Consistent with extant literature (Sveningsson and Alvesson, 2003; Harding *et al.*, 2014), individuals occupying hybrid positions do undergo identity conflict arising from fragile identity constructions, and negative emotional experiences with managerial subjectivities. Protection against this explains, perhaps, why all of the Heads worked so hard to retain their educational identifications. Maintaining strong salience with education acts as a staging ground for forays into managerial identifications, mitigating the risks of marginality and of failed or less successful ontological excursions, grounding and securing the individual's identity. Further, there was evidence that the stresses and strains of playing in 'two or more games at the same time' (Kraatz and Block, 2008) is ontologically wearing. For some of the interviewees performing across educational and managerial discourses felt very much like work.

6.3 CONTRIBUTIONS AND RECOMMENDATIONS

As this section now examines, the research findings of this thesis have generated a range of useful insights and contributions to knowledge.

6.3.1 The Economics of International Schooling

An initial contribution of this work is its critique of the assumed economics of international schooling. Challenging the received wisdom that international schooling is highly competitive,

market analysis and economic modelling has established that many (though by no means all) international schools enjoy buoyant market conditions. The basis of this finding is evidence that many international schools seem to enjoy a lack of substitutability, low buyer and supplier power, monopolistically competitive market positions and demand that (for the moment) outstrips supply.

That said, it would be remiss not to highlight that these findings are in the aggregate. Not all schools experience such benign conditions and not all experience excess demand. Indeed, the lived reality of international schooling *is* increasingly competitive. Application of economic theory may highlight that the basis of competition is market positioning, not revenue or survival, but that makes the competitive influences no less fraught and no less real.

What Chapter 2 contributes then is a provocation and stimulus for discussion. It offers a challenge to educational leaders (and to academic researchers) to think a little differently about what actually these schools are competing for and, therefore, how they might best compete. Indeed, it was through such thinking that the attention of this thesis turned towards discourse, and towards institutional and identity work, as the terrain being contested.

6.3.2 Distinguishing between Management and Managerialism

Via Table 3 (in respect to theory) and Table 13a (in respect to empirics), this thesis makes contributions to how the differences between management and managerialism are understood and might be revealed. In extending the findings of the more general and less practice-orientated view found in prior literature, what this thesis offers is a matrix of identifiers – practice/s, language, structures and procedures – which might be used to recognise management *vis-à-vis* managerialism and *vis-à-vis* commercialism. For example, in the context of this study, the

linguistic shift from Appraisal to Performance Management and, more recently, to Professional Growth evidences a shift from practice (the former) to managerialism (the latter); though not (yet) widely adopted, future shifts towards PRP and Profit Share would indicate commercialism.

These distinctions are important because they caution against the conflation of management and managerialism, and of managerialism with business-like thinking, thus encouraging more nuanced critique. At the risk of heresy, this distinction may even encourage other writers to recognise the *potentials* of managerialism; to recognise that (just maybe) managerialism need not necessarily occur at the expense of educational purpose and values. That is, rather than adopting a position where any form of management is fair game for criticism, a more nuanced view may allow future research(ers) to consider whether, how and where managerialism might inform management practice – for the good of schools, for the good of school leaders and perhaps even for the good of students. That is, an extension/deepening of this line of analysis would add further detail and nuance to the matrix of identifiers offered here, enabling researchers (in this and other contexts) to better establish when necessary (functional) management becomes (performative) managerialism or when it becomes more commercially orientated, and to what potential benefit or detriment.

6.3.3 Institutional Work and Identity Work

This study has drawn attention to important links between institutional work and identity work. Using as its basis Lawrence and Suddaby's (2006) taxonomy, it has been established that Heads promote and perform particular narratives, undertake particular tasks (and not others), and that they act in certain ways – *mythologizing*, *advocating* and *mimicking*, for example – not only because these acts describe and construct schools and Headship as they wish them to be (*institutional work*), but also because they describe and construct particular versions of their own

selves (*identity work*). It has been proposed that, to varying degrees, each of Lawrence and Suddaby's forms of institutional work can be seen in this light. Every act of institutional work is, albeit perhaps sub-consciously, also an act of identity work, and *vice versa*.

Lawrence and Suddaby's taxonomy is suggested as an analytic for further consideration of the interrelationship between identity work and institutional work. It is argued that identity does not simply *describe* the relationship between an actor and the institution (Headship/schooling), rather, identity work and institutional work are mutually constitutive (institution and subject inescapably intertwined). The taxonomy can, therefore, as attempted in this thesis, be used to deconstruct (and allow the researcher to recognise) how particular meanings become assimilated, repeated, stabilised and normalised in and through institutional and identity work. The proposal is that the taxonomy might usefully be translated as a means by which to recognise struggles *between* selves (between preferences over institutional form) and *within* self (between possible identities); each type of institutional work representing a particular (though not exclusive) technology that an individual can adopt as they work with and against the grain of dominant and subordinate discourses and as they work at their own identities. This study has made some preliminary use of that mechanism and suggests that there would be value in work that extends this initial thinking.

Additionally, institutional work and identity work provide an explanation for the relative (and surprising) lack of managerial practice found in the sampled schools. Leading private entities and free of government regulation, international school Heads generally have more autonomy than their UK, US and Australian counterparts. There is therefore a different relationship between identity work and institutional work in the international school context. Indeed, finding corporately-owned schools no more managerial than their not-for-profit counterparts is highly revealing. Interviewee C5's blocking of performance-related pay despite corporate pressures

(5.6.6) is indicative of the power some Heads have to determine school/group policy. While Western-context Heads have also been found to reconstruct/deconstruct managerial influence (Thomson, 2008; Thomson and Sanders, 2009; Thomson and Hall, 2011), international school Heads do have more sway over their schools – at the very least, they are not beholden to the same regulatory influences. The freedoms of the international school context provide an arguably greater scope for identity work to find traction institutionally. That is, the strong salience Heads accord to educational *identities* and their power as institutional agents helps explain the lack of managerial *practice* across international schools.

What appears to be happening is that hybridity translates relationships of power between educational and managerial discourses via the medium of identity work. In turn, institutional work translates those same influences within and across schools and throughout Headship. This further links to perception of purpose (5.6.7.3). Institutional work performs a different, less resistive, function where managerialism is seen to have benign or potentially positive influences (on school, on self and/or on the profession). The outcome of this identity-institutional work interrelationship is that in not-for-profit contexts (or in contexts where managerialism is seen as complimentary to educational purpose) one finds a marginally greater degree of managerial practice.

These findings have obvious (though potentially worrying) interest for policy makers but, perhaps more importantly, and certainly less contentiously, they also have value for school leaders (and leadership researchers) seeking to understand how managerialism might be resisted, moderated and identifications as professional protected.

6.3.4 Towards A General Theory of Manager Hybridity

As the recent publication of a special edition of *Public Administration* (June 2015) on the topic 'Understanding Public Hybrids' indicates, the concept of hybridity has gained topical academic attention. Much of this attention is, however, focused specifically on public sector organisations and, by virtue of the research interests of the academics leading on the subject, has a particular bias on health care. Alongside the definitional ground clearing and consideration of hybridity's roots in the literature review, the primary contribution of this study is to extend the concept to education. As noted above, this contribution is a theorising of occupational- *and* ontological-led responses to managerial governance, with Heads performing identity work through *Teacher-Head, Head-Teacher, Pragmatist-Broker, Educational Manager* and *Educational Executive* subject positions.

Nonetheless, while these categorisations are achieved by Heads working in international schools, and have been evidenced and described as such, they are not necessarily exclusive to that context. With education taken as one set of discursive influences and managerialism as another, these categorisations are potentially sustainable elsewhere. The bracketing out of regulatory and economic influence has led to a particular treatment of situated hybridity, but the resultant findings may be applicable in other educational contexts regardless. That is, with identity proposed as the key site of managerial governance, Western and international Head's subjectivities may be disciplined similarly; and the work done (institutional and identity) in relation to those subjectivities may play out comparably, even if the practices that result may differ. At the very least, the theories and types of hybridity presented here are testable across other educational domains.

Additionally, and encouraged by Currie and Croft’s (2015) call for academic research to move away from a preoccupation with uni-professional studies, Table 18 provides a foundation for these theories and types to be tested across other contexts:

Table 18: General Theory of the Hybrid-Manager Identity Work/Discursive Subject Positions

THE HYBRID RESPONDS TO MANAGEMENT:				
OCCUPATIONALLY		OCCUPATIONALLY AND ONTOLOGICALLY		
THE MANAGER-HYBRID IDENTIFIES AS:				
Practitioner	Lead Practitioner	Pragmatist-Broker	Manager-Practitioner	Manager
TYPICAL BEHAVIOURS MIGHT BE:				
Refusal Negation, Contestation	Reluctance, Alternation, Segmenting	Pragmatism, Moderation, Accommodation	Opportunism, Co-option, Facilitation	Additive, Adoption, Adaption

Before expanding on Table 18, two important caveats warrant mention. Firstly, even in hybrid form the professional project is never an ‘outcome’ and typologies are useful only as exploratory devices and not as ‘fixed’ representations. Secondly, as the literature review established, for hybridity to have value (theoretically and empirically), it needs to be situated in, and explored through, particular research sites – those sites need not be uni-professional but they do need to be locales where, at the very least, professionals (perhaps of multiple types/backgrounds) are required to engage with management/managerialism. With those cautions in mind, it is proposed that the non-contextually specific labels used in Table 18 (and the explanation of those labels below) could be adapted and made bespoke, allowing researchers to explore hybridity in other settings where former practitioners now occupy formal and distinct management positions.

In regard Occupational-Hybrids, as theorised here, some of these professionals might identify as *Practitioners*, doing management only reluctantly, strongly resisting managerialism and its identifications; some will identify as *Lead Practitioners*, recognising and accepting that this requires engagement with managerialism while remaining at heart practitioners. Overall though, for occupational hybrids, their identities are governed (and thus empowered) by their adherence to the norms and conventions of practice.

Bridging occupational/ontological positions, some professionals will be *Pragmatists*, identifying as brokers between the varying influences of management practice and the potentials of managerial identifications, doing management and being managers as context (or opportunity) demands.

Ontological-Hybrids identify through managerialism, but do so through varying degrees of involvement with and attachment to practice. The *Manager-Practitioner*, for example, identifies managerially but undertakes practice as and when required to either 'get their hands dirty' or as part of a 'cherry picking' of elements of practice that appeal to them (contextually, the Head performing in a school play, for instance). The final hybrid, the *Manager*, has not necessarily abandoned practice, but they do identify with/through managerialism, maintaining executive oversight of practice; their hybridity is governed by the status and power accrued by being 'above' day-to-day practice whilst being firmly (perceptually at least) in charge of it.

For Ontological hybrids, the claim to expertise across multiple domains (management and practice) is, of course, the most vulnerable of all of the positions; an observation that perhaps explains why establishing ontological security in this position requires experience. Equally, this observation also emphasizes the appeal of more secure practitioner-led identifications. To avoid the discipline of disassociation with professional status, *Manager-Practitioners* and *Managers*

are likely to work hard at being seen to act within the boundaries of 'traditional' professionalism. In the case of this study none of the Heads has disassociated with practice; indeed, all laid strong claims to remaining strongly associated with education – other studies of hybridity (as cited throughout this thesis) report similar findings.

Key is that this general theory of hybridity, in contrast to much of the prior literature, relates to former practitioners now holding formal and designated management positions and how these professionals are governed in relation to that position. That is, where, for example, Croft *et al.* (2015) examine nurses who are required to take on *additional* management tasks, the focus here is on practitioners who now occupy defined management positions, with little formal requirement to undertake elements of practice. The unique perspective of this theory is how hybrid-professionals adopt, resist or mediate practitioner and managerial identifications in ways which fit with and/or fuel their position as 'manager'. The establishment of a link between institutional work and identity work (above) being the means by which these identifications, and thus the governing influences of discourse, might be tested and revealed.

6.3.5 Becoming a Manager Hybrid

A further contribution of this study is an understanding of how the hybrid manager-subject develops and how hybridity might be cultivated. As discussed, and as highlighted in the literature in other contexts (most notably by Spyridonidis *et al.*, 2015), length of tenure and perception of purpose seem to be key determinants of how an individual is governed as a particular form of hybrid. I offer the following as factors which might determine the extent to which an individual is exposed to managerialism, and as a consequence, experiences subjectification through (or against) its discourses:

Experience in ‘Corporate’ School Environments: Early career socialisation in ‘corporate’ school environments (defined by practice not by organisational form), especially performative ones (in the Lyotardian sense), is likely to see managerial discourses wash around, over and/or through the subject, thus subjecting that individual to reflections on their identity (incidentally or otherwise). For some this reflection will result in an affirmation of their educational self, segmenting the corporate as “not who I am” (Interviewee C24). For others there will be greater ontological ease with the Darwinian reality of corporatised education, of management and with the role of manager.

Management Training: Management qualifications may not, as the data analysis shows, currently be required for Headship but they do seem to be a predictor of hybridity, or to some degree of openness to new forms of managerial identification – they position the individual in the liminal space between education and management. Choosing to undertake an MBA (or similar) would therefore be an important first step towards (ontological) hybridity. Furthermore, the skills and knowledge gained through management training will add, at a practical level, to the individual’s (occupational) ability to perform as a manager.

6.4 EMERGENT THEMES AND FUTURE RESEARCH

During the research and data analysis phases of this project various themes emerged as interesting but, ultimately, beyond the scope of this thesis or outside of its methodological confines. Here those themes are briefly elucidated with a view to future research possibilities.

6.4.1 Educationalism

Supported by literature review, it has been argued that the genesis of most Heads' careers is the classroom. Most Heads, and certainly all of those studied, were once teachers. It is unsurprising then that they draw strong identity salience from what it means to be a professional *educator* – Interviewee C7's comment that any educationalist who identifies with anything other than education has "sold their souls to the Devil" is indicative of how deeply these discourses bite. It might be argued then that educational discourses go beyond teaching in the same way that managerialism goes beyond management. The focus of this study was on the latter, but these findings suggest a domain of future research that explores *educationalism* (a term, as yet, not appearing widely in the literature). That is, in what ways do the discourses of education act on the subject, the *manager*-subject particularly? In what ways does educational discourse privilege, affirm and promote the educational leader as something more than 'just' a manager? More critically, are Heads really still 'teachers' and, if not, why do they hold onto this identification? It was beyond the scope of this work to address these questions, but the data did throw up useful pointers toward future study.

6.4.2 Profit Orientation/Organisational Type

Evident throughout the findings were interesting similarities between for-profit, not-for-profit and corporately-owned schools. Where one might have expected greater variance between practices within these schools – the reasons for ownership are, after all, fundamentally different – across the various themes surveyed, the different ownership types take subtlety but not significantly different approaches. Moreover, such that there are differences, somewhat paradoxically, it is the not-for-profit schools that appear to have adopted more managerially inclined practices, albeit very slightly. Returns from the online questionnaire showed that not-for-profit schools seem more inclined to adopt business-like job titles and the for-profits to reject

the very same. Proportionately, the not-for-profit schools are also marginally more likely to use performance-related pay, more likely to appraise Heads against budgetary targets and more likely to use parent surveys. These differences have been explained above (6.3.3) as indicative of the relationship between institutional work and identity work and of the freedoms and power enjoyed by international school Heads. Investigating whether these findings play out over a larger data set, and with this thesis establishing a firmer basis for identifying/revealing managerialism, further testing its presence across different school forms and with other school contexts (UK, US, Australian, for example) presents interesting research possibilities.

In addition, with Heads as the main focus, this study has only probed these differences as pertinent to identity work. Other differences between types of school ownership, and other potential outcomes of these differences, were identified in the data but not explored due to relevance and word count (school governance arrangements being one example) and some possible lines of enquiry not followed due to commercial sensitivities (the impact of salary variances between school types on recruitment and retention, for instance). While there would be inherent research challenges, the opportunity presented by international schools for a more detailed study of the differences between for-profit and not-for-profit schooling would be important because it would reflect a fundamental question at the heart of neoliberal discourse – does the for-profit motive produce ‘better’ (however defined) schools?

6.4.3 Intersectionality

As has already been acknowledged, through its own limitations of scope and purpose, this study did not seek to acknowledge intersectional conditions of possibility beyond the subject as constituted through educational and managerial discourse. In future research those possibilities might, however, be considered.

For example, gender emerged as an interesting anomaly in the data-set. While there were insufficient females in the study to comment with authority, those that there were seemed *less* likely to adopt ontologically-hybrid subject positions. Seeming to prefer occupationally-hybrid positioning every female studied was strongly aligned to educational identity (two of the six having returned to Headship after posts in other educational management but none school-based contexts).

Importantly, this observation aligns with the view noted in the literature that managerialism is particularly seductive to the masculine subject (Usher and Edwards, 1994; Kirton and Greene, 2010; Pullen and Rhodes, 2015). However, what does not seem to be happening, as the literature suggests might (Casey, 1995; Gleeson and Shain, 1999), is the collusion of the female Heads studied into masculinised forms of management. Perhaps perceiving an erosion of educational purpose, the female Heads were much more likely to undertake identity (and institutional) work that policed/protected their subjectivities (and the profession) as traditionally defined. This is perhaps the result of (quite literally) *self*-selection. The underrepresentation of females in international school Headships may result from the reluctance of female senior leaders to identify with the masculine/managerial forms necessary for success, or at least for successful appointment as a Head. The design and focus of this study does not allow for more detailed analysis of how this particular intersectionality affects identifications, but these emergent findings do point towards an interesting line of future enquiry.

Additionally, evident after the interviews had been completed was that all of the Heads studied were married, all had children, all were later- (or at best middle-) aged, and most of Western

ethnicity⁵⁸. Whether and how these various domains of identity intersect and inform how a Head relates to Headship (and the type of hybrid they are governed into) would be intriguing research.

6.4.4 'International' Schooling

A further extension of this study would be consideration of how the 'international' elements of international schooling affect what Heads do. Such research might include:

- Consideration of whether 'international' is itself an important identifier, and an important source of meaning for international school Heads.
- Examination of whether/how the cross-cultural dimensions of internationally-located Headship influence identity. Do Heads working internationally become, for better or worse, cultural hybrids?
- Extending the work of Hardman (2001) in relation to 'types' of international school teachers, investigation of whether international school Heads can be similarly categorised (perhaps into categories such as Nomad, Entrepreneur, or Pioneer, for example).
- Comparison and contrast, through case study, of Headship in national and international settings.

6.4.5 Hybridity and the Middle Manager

The focus of this study has been school Heads, senior individuals at the top of the organisational hierarchy. Hybridity is not, however, relevant only to these subjects. Indeed, the middle manager, sitting between the boardroom (i.e. the upper echelons of management) and the

⁵⁸ Note that, as Chapter 4 described, the non-Western Heads included in the study were deliberately chosen to ensure fair representation; the reality is, however, that the vast majority of 'international' school Heads are Western (Hayden, 2006).

blackboard (i.e. the day-to-day realities of practice) may be subject to hybrid identifications more so than senior managers. Resultantly, as literature on hybridity develops, middle managers are falling more and more under the academic gaze. In the health care contexts on which much extant literature focusses, middle managers are (increasingly) prominent. Papers by Currie, Burgess and Hayton (2015) and Burgess, Strauss, Currie and Wood (2015), for example, explore how the tensions and competing agendas that middle managers face produce hybridity. With the notion of being 'stuck in the middle' also receiving attention in educational literature (Fleming, 2014), a cross-fertilisation of ideas and concepts from health care would be a valuable and interesting future project – especially given the centrality of middle leaders to school improvement (Bush, 2002; Bush and Glover, 2012).

6.5 METHODOLOGICAL CONSIDERATIONS

The interpretative nature of this study makes its aims and objectives complex, elusive and subject to multiple interpretations. In other words, the research questions cannot themselves be 'answered' in any definitive manner, nor indeed through the application of the most rigorous discourse analysis methodology. Ultimately, as has been argued throughout, the 'findings' are simply a moment of narrative generated through intersubjective engagements with the research participants, each 'history of the present' (Foucault, 1977:31) formed within its own unique discursive space. It is not enough to simply acknowledge one's own subjectivities; one has to acknowledge the painful incompleteness of any work which attempts to wrestle with the subjectivities of others – not least of all because the data captures a specific moment in time. What I have presented then is not a declaration of universal truth, arrived at through longitudinal and positivist organisational science, but rather a 'culturally and historically specific way of thinking about work and society' (Jacques, 1996:vii). A mixed-methods approach may have added

a dash of quantitative insight but the study remains, and was intended as, an interpretative one – no claim is made otherwise.

This approach has, I argue, allowed the research questions to be effectively answered. While there is scope in regard to each question for further work (as above), the critical enquiry hailed in the thesis title has, I believe, been successfully realised. Given that title, RQIII has received the most attention. The work of RQI and RQII was to establish a framework for enquiry into the identity work of international school Heads; primarily, a sharpening of how managerialism is treated, its antecedents considered and its processes revealed. In future work RQI and RQII are worthy of further attention in their own right. With some degree of frustration (and some degree of relief) the confines of a PhD have not allowed for all avenues and all angles to be pursued, considered and dissected. A cross-contextual comparison of managerial practices, longitudinal studies of changes in practice and recruitment demands over time, and/or a more extended focus on the discourse *communitⁱes* of international school leadership would not only be valid enquires themselves they would also enrich understandings of identity work, providing foundation for further contribution across a number of fronts.

This section is a consideration of how choices of methodology and method have affected this thesis and, no less importantly, a reflection on my own development as a researcher during the process. However, in terms set by its own limitations this thesis has, I submit, addressed that which it set out to.

6.5.1 Online Questionnaire

With student rolls ranging from 55 to 5,000 (the average roll within the sample being 749 students), and with all major curricula types included, the online questionnaire covered a globally diverse sample of schools. However, as discussed in the methodology, a limitation of the study

is the statistical validity allowed by the sample size. The consequence of this is two-fold. Firstly, it reduces the generalisability of the findings; little claim can be made that the findings of the study are representative of *all* international schools – though, importantly, no such claim is made or was intended (the intent of the questionnaire was primarily to inform qualitative analysis). Secondly, the margin of error (+/- 5%) means that the differentials between questionnaire responses are not always statistically significantly significant. Where reference is made to the differences between for-profit and not-for-profit schools on occasion those differences are within the margin of error and, in terms of reliability, these differences should be (and have been) read with caution.

That said, despite the proportionately low response rate, I believe that the results represent a sufficiently diverse sample and a sufficient number of responses to reflect internal validity (Lincoln and Guba, 1985). Moreover, as noted above, the epistemology of this thesis is interpretative; as such the purpose of the questionnaire was to inform qualitative analysis and this, I fully trust, the sample size adequately allowed for.

6.5.2 Comparative Data

As described above, a contribution of this study is its advancement of a theoretical distinction between management practice, managerialism and 'business-like' thinking. Current literature is strong in its philosophical musings re neoliberal discourse and its implications for education at the level of policy. It is less strong though in identifying the detail and nuance of when and how necessary management becomes unnecessarily managerial. The literature review identified very few studies which quantify/elaborate the management-managerial divide. This lack of comparative data, while creating space for the contributions of this study, has limited the extent to which I have been able to compare and contrast international schools with UK and/or US State

schools (or with business contexts). Whilst the data on managerial practices collected for this study have been used to inform qualitative analysis of Heads' identity work and were never intended for stand-alone quantitative comparison, having benchmarks of practice/s as present in other contexts would have added useful comparison, particularly in regard to Research Question I. This potential for comparison to other contexts suggests potential lines of future research.

6.5.3 Interviews

As an interpretative epistemology acknowledges, there was the potential within this study for the unavoidable influence of researcher (my own) bias and skill. Limitations may, therefore, have existed in relation to my ability to consider, draw out and review all possible themes without the influence of prejudice and preconception (Glaser and Strauss, 1967). This possibility was mitigated through iterative discussion of early findings with other researchers and by drawing extensively and reflexively on literature that informed, supported or contrasted with the findings.

Further critique can be leveled at the (deliberately) semi-structured nature of the interviews. While this approach is entirely in keeping with an interpretative CDA methodology (see Wodak, 2009), on reflection, more structure may have been beneficial. For example, the topic of accreditation was discussed in many of the interviews but exactly *what* was discussed varied (not least of all because there are a variety of accreditation bodies and their demands multiple). In one sense, this allowed for themes to emerge organically, but, and particularly in light of the subjugating effects of professionalism, more consistent questioning in relation to accreditation may have drawn out relevant data – the potential for particular forms of accreditation to coerce certain types of practice and certain types of identity work on behalf of Heads, for instance. As it

is accreditation is an interesting area for future research but is not explored in specific detail in this study.

In sum, what is evident is that my own sensitivity as a researcher (and thus my awareness of dominant themes across the interviews) improved as the interviews progressed. Were I to undertake the interviews again, I do not believe that the findings would be fundamentally different - the interview data are similar enough to suggest 'data saturation' (Bowen, 2008). I do believe though, that I would be more efficient (avoiding interesting but circumstantial sidetracks), more sensitive to nuance and more attuned to themes and pressures that I was unaware of at the start of the process.

6.5.4 Critical Discourse Analysis

Finally, CDA methodology is worthy of further comment. It was instructive after concluding my analysis to reflect on whether the interviewees, particularly those who are profiled in section 5.6.3, would recognise themselves in the analysis. In other words, how far does CDA abstract from the subject to the point where the subject becomes unrecognisable? Furthermore, if the subject cannot recognise him/herself what does that say for the validity of the study?

While it is inevitable that CDA reveals details of which an interviewee may not be self-aware (the interviewer is, after all, reading not just spoken words but also intonation, pauses, emphasis, body language and discourse) it is arguable that if the subject is entirely unidentifiable in the text then it is the researcher's subjectivity that is being featured and not an informed analysis. Subjectivity may be unavoidable, but there is an important difference between analytical *interpretation* and overly extrapolated *fabrication*. In the case of this study, I do believe that the interviewees would 'see themselves' in the analysis. They may not, of course, be consciously

aware of what I am drawing to the surface – as Nietzsche (n.d.) suggests, “the self remains opaque to its self” – but I trust that the interviewees would identify with the subject positions for which I have used them as exemplars.

This, of course, begs the question what if the interviewees did not see themselves in the data? Has the researcher gone too far in extrapolating rather than just interpreting? Perhaps it should be part of the discipline of CDA to return pertinent sections of data analysis to interviewees for confirmation⁵⁹, thereby iteratively ‘zeroing in’ on a fair and agreeable interpretative position. However, while on the one hand this may add to the validity of the findings, on the other, the researcher risks an interviewee reacting badly to the interpretation – the interpretation may be entirely accurate but not one the interviewee shares, likes or would wish to know about themselves. What then for those research findings? Are they to be dismissed, changed to appease the interviewee or included regardless? None of those situations are entirely satisfactory. Additionally, the potential is for a project stuck in an infinite cycle of analysis, checking, (re)analysis and (re)checking. Perhaps then, it is enough that the researcher, as in the case of this study, is self-critical. It is incumbent on the researcher to honestly critique their findings, avoiding (to the extent possible) an entirely subjective rather than academically considered analysis; in other words avoiding ungrounded extrapolation where the aim is reflexive interpretation. This has, I hold, been achieved in this study and, again, *internal validity* assured (Lincoln and Guba, 1985).

⁵⁹ The appropriateness of checking/confirming the validity of the CDA findings with the interviewees for this study was given significant consideration. In the end it was decided against partly because a number of the interviewees had moved on since the time of the interview and would have been difficult to track down. More importantly though, after much reflection, it was felt that any such checking was superfluous. Each case study was read separately and at a distance (time wise) from both the interview and the analysis; on critical review it was felt that each case is an accurate, valid and fair interpretation of each interviewee’s position – one the interviewee would agree with.

6.6 PERSONAL REFLECTIONS

An obvious but as yet unanswered question is where I would place my own self within the various subject positions identified. As discussed in Chapter 1, at the outset of the PhD journey, I was very much invested in management; I was a manager, and by all accounts a successful one. By training, by experience, by job title and by ontology I would be a strong exemplar of the *Educational Executive* – indeed, if asked, this is the self I would have identified with and, I have little doubt, the self others would identify me as. It is inevitable, however, that the PhD journey has affected me and that it has permeated my identity. The scope of my subject positioning has undoubtedly changed.

Having started the journey very much on the side of business thinking, I now find myself less certain, perhaps even confused, about that positioning. That is not to say that I now identify more towards the educator-practitioner positions, rather, that I find it difficult to identify with *any* of these positions. As researcher, standing outside of the various discourses that govern these positions (not least of all being outside of the day-to-day melee of school management) has afforded me a more critical (and admittedly very privileged) view of not only what is ‘out there’ but also what is ‘in here’ (within myself and within other selves). The academic, theoretical and critical management perspective I am now afforded has allowed me to see the taken-for-granted assumptions behind decisions, behind the professional conscience, behind (Lyotard’s and Butler’s versions of) performativity and, in particular, behind the power dynamics of identity work.

Performance management provides a useful illustration here. As part of my Post-Doctoral corporate role I am expected to contribute, in the role of management consultant, to the review of Performance Management across the corporate group for which I previously worked, the

assumption being that my knowledge will help to sharpen, extend and more rigorously validate the work done by these mechanisms. My old self would have engaged with these conversations with vigor (indeed, I would have identified with the normative conceptions and power dynamics suggested by the manager-subject position). My new self is faced with questions (occupational and ontological) as to which role and identity I perform: academic, manager and/or practitioner. More importantly which of those performances are now authentic and which inauthentic? Having worked at different, non-managerial, elements of my identity, what once felt real, what I once identified as, now feels much less so. Thus, just as I asked of my research participants, I must now ask myself: who and what am I? The answer to that question, as with the participants, will not be singular nor will it be static, this is merely another stage in my own evolving subjectivity – the question though is an important one.

Perhaps, however, the greatest insight the PhD has afforded me is that there need not be an answer. We identify with things (occupations, for example) that subsequently render us real, not only to our selves but equally importantly to other selves, yet, if identity is, as postulated, fluid, transient and contingent, then recognising this frees us from the need 'to be' some definite thing. We hold on to our various identifications out of existential necessity but these identifications are not fixed and sovereign, nor are they exclusive. Perhaps then the greatest insight, and the most powerful, is that the self never *is* it is only ever *becoming*.

6.7 CONCLUSIONS

This study set out to critically examine the professional identity work of international school Head teachers. Specifically, the identity work of a manager class (Heads) professionalised by one set of discourses (education) but also experiencing the governance potentials of other discourses (managerialism). The micro-processes of identity work have been explored and shown to be products of discursive practice, its reproduction, interpretation and re-shaping by the actors involved.

This investigation has been important because, while prior scholarship has examined the implications of neoliberal governance arrangements for practitioners who *also* work as managers in managerial settings, the implications for professionals holding designated management positions has been given comparatively little attention. Even less attention has been given to educators choosing to work outside of national frameworks, and less still to international schools.

The value of studying this context has been the ability to focus on the effects of *discourse* rather than the effects of *directive* – an important distinction, both empirically and epistemologically. Establishing the background of this study and contrary to much of the prior (Western focussed) literature, Chapter 2 described a situation where the governance effects on professionalism cannot be (solely) ascribed to external pressures (to government, to the market, or to corporate influences). Despite favourable economic conditions and regulatory freedoms, international school leaders do seem subject to many of the same professional tensions as widely reported to be influencing educational leadership within Western public sector contexts (Gewirtz *et. al.*, 1995; Ball, 2003a, 2003b, 2012, 2015; Deem, 2004; Bottery, 2007). The literature review (Chapter 3) explored theories which helped illuminate why this may be the case.

That review drew important attention to identity work as a source (and, in international schooling, perhaps the most important source) of professional change. An epistemological position has thereby been established where the Head is not reduced to mere subject, bound by the iron cage of managerial discourse, nor is the Head a hyper-muscular educational superhero, given unbridled agency over organisation and over self. Rather, the Head is seen to be governed by discourse into plural 'always already' subject positions through which the self is created, affirmed, protected and assured, and from which can be drawn power. The environment in which international school Heads work has been shown to connect and encourage versions of professionalism which draw salience from *both* educational purpose and from managerialism. Heads address managerialism not solely because of external factors but in ways that fit with and fuel their *subjectication* both as 'educator' and as 'manager'. How this occurs, how discourse is made real, has been the empirical focus of this study.

In this regard, educational discourses sit as strong counter to the power effects of managerialism; recourse to discourses which articulate the subject differently over and against 'determinations of measurement' (Ball, 2015:6) seeking to loosen the connection between managerial subjugation and the sense of self as educator. As repeated assertions of the inherent importance of education (and of Headship) indicate, Heads attempt to capture discursive power through claims re the moral superiority of education. Governance via educational discourse fuels institutional and identity work which, grounded in the security of the professional collective, offers a range of powerfully validating subject positions, mitigates the uptake of managerial practice, protects against self-doubt, and limits identity encroachment. Educational identifications, for all of the Heads studied, remain important.

Yet, while it may be axiomatic that Heads identify as educationalists (classroom-based teaching is, after all, the genesis of most Head's careers), it was also clear that the international school is

an active site of evolution in the identity work undertaken by educational professionals. The discourses Ball (2010) suggests are recasting educational identities - neoliberalism, managerialism and performativity – are an influence (albeit, not yet with the same bite and ubiquity as in Western contexts/locations). This places the Head in an arena of latent and potentially overt contestation. Heads have to work with the grain of existing and dominant discourses and subjectivities but, as they do this, they also have available to them a variety of sometimes overlapping, sometimes conflicting, and sometimes empowering discourses and subjectivities that may go against the grain. In these terms, being a manager (a Head) is both risky and seductive. Being a manager suggests a privileged ontological location, whereby the manager is existentialised through the discourses which give advantage to that identity position, even if that involves occupational tasks or ontological identifications that sit (sometimes) in tension with an individual's sense of educational self.

The primary contribution of this research is to demonstrate how these positions might be reconciled. With particular interest to serving and aspiring Heads, but also to school recruitment panels and government policy makers, it has been shown how educationalists can remain firmly grounded in their unique dedication to the common good while harnessing the assumed virtues of being managerial which make that notion so compelling. The practitioner can *do* management without identifying as a manager, and the manager can *do* practice without giving up the benefits of managerial identifications. Instead then of professional exclusivity and protection being replaced or degraded by performativity, instead of the educationalist losing autonomy to managerialism, what has been presented is a re-professionalisation of the school leader, not as old or new professional, but as something newer still – as hybrid.

The data has shown hybridity to be important because it illuminates a discursive space in which the production of organised, docile bodies through educational *or* managerial disciplinary

practices can be challenged. Through hybridity, and through the cultivation of occupational and/or ontological power, professionals might be able to manage, not serve, the discourses of education *and* managerialism, generating a sense of personal authority and control. As dominant and subordinate relationships of power shift between educational and managerial positions, the individual who can 'read' the interdiscursive contingences and locate his or her self accordingly might be best able (albeit momentarily and fleetingly) to exercise this power. This is a powerful narrative ethic that makes possible the restoration of individual agency within and against the professional order.

Connecting these processes is institutional work. Through use of Lawrence and Suddaby's (2006) taxonomy, Heads have been shown to (be attempting to) govern Headship as they wish it to be (through *institutional work*) and as they wish their selves to be seen (through *identity work*) – the circular nature of that relationship fashioning both institution and self. It is through institutional and identity work where one sees discourses made real; where the relationships between field (Headship) and self (Head) are revealed in terms which construct the subject. The applicability of these discourses, which are risky and which offer a sense of ontological and/or occupational purchase, will depend on the sense of contingent advantage, difference or affirmation each governed subject position offers. Heads do though seem to be governed in a 'space between' the disciplinary affects of educational management, managerialism and the extremes of commercialism through both occupationally- and ontologically-led responses. With important caveats about privileging any given subject position and equal caution about the tendency of taxonomies to suggest fixed modes, emerging from the data was a sense that Heads address managerialism through a combination of *Teacher-Head*, *Head-Teacher*, *Pragmatist-Broker*, *Educational Manager* and *Educational Executive* subject positioning.

Abstracted to more general theory, suggested here is that manager-professionals in any field, and certainly those governed through both occupational and managerial discourse, might identify as *Practitioners*, doing management only hesitantly, strongly resisting managerialism and its identifications; as *Lead Practitioners*, who accept the necessity of management, reluctantly adopting some of the occupational demands of managerialism; as *Pragmatists*, who broker between the varying influences of management practice and the potentials of managerialism for self and for school; as *Manager-Practitioners*, who identify as managers but also undertake, enjoy and identify with practice according to occupational and/or ontological demand; or as *Managers*, those who are comfortable with the manager designation and who draw power from managerialism.

The analysis thereby provides a contrast to, and develops understanding from, previous studies which see the practice and management as opposed (*cf.* Elliott, 1996; Randle and Brady, 1997; Clarke and Newman, 1997; Bush, 1999), instead highlighting the ways in which subjectivities are worked at by professionals seeking identification across interdiscursive regimes. Hybridity in these terms is a powerful concept. The *manager-practitioner* is affirmed as non-marginal; reified through varying discursive possibilities, with organisational and professional plurality each becoming sources of power. Rather than managerialism necessarily putting 'a stress on procedures at the *expense* of educational purpose and values' (Bush, 1999:240 *emphasis added*), through hybridity there is the potential to configure non-exclusive, blended and shifting, yet entirely legitimate, identities which cross-cut multiple discourses. For some, occupational hybridity, underpinned by salient educational identification, allows access to management positions without the perception of 'selling one's soul'; for others, the vulnerabilities of identifying ontologically with/through managerialism can be mitigated by retaining identification with occupational practice. As such, the successful manager-professional needs to be identified and judged against criteria other than by a practitioner *or* managerialist dichotomy. Finding

similarly to McGivern *et al.* (2015), just as important for professionals as technical management preparation might be the ability and willingness to enact *hybrid* roles which cross-cut practitioner and managerial identifications. Learning *to be* a hybrid may be more important than learning *to do* either practice or management.

In conclusion, it is clear that managerialism *is* influencing the identity work of international school Heads. Educational discourse remains highly salient but, present (to varying extents) 'out there', managerialism can also (and perhaps more readily) be found 'in here', inside the hearts and minds of these professionals. Heads are governed by *both* educational *and* managerial discourses, and not least of all by their own identity needs. Subjectivity is therefore recognised as the key site of governance; resistance against and, importantly, empowerment via interdiscursive disciplinary regimes invoking the production of the hybrid manager-practitioner. Contributing to theoretical and empirical understandings, this study has shown how hybridity enables the professional subject to navigate difficult and contested institutional terrain. Whether done so occupationally and/or ontologically, the successful hybrid needs, at the very least, to be as comfortable with the demands of management (and perhaps even managerialism) as they are the demands of practice – indeed, for hybrid professionals, these are one and the same.

APPENDIX I

WORD FREQUENCY ANALYSIS

APPENDIX I: NVIVO WORD FREQUENCY ANALYSIS

Full list of the 50 most frequent words found in the recruitment documentation. Generated via an Nvivo word frequency analysis (n = 100).

NO	WORD	COUNT	WEIGHTED PERCENTAGE	SIMILAR WORDS
1	schools	2011	4.51%	<i>school, schooling, schools, schools', school'</i>
2	develops	550	1.23%	<i>develop, developed, developer, developing, development, developments, develops</i>
3	students	490	1.10%	<i>student, students, students', students'</i>
4	managing	427	0.96%	<i>manage, managed, management, management', manager/s, manages, managing</i>
5	ensure	324	0.73%	<i>ensure, ensures, ensuring</i>
6	experiences	315	0.71%	<i>experience, experiences</i>
7	leadership	285	0.64%	<i>Leadership</i>
8	principal	267	0.60%	<i>principal, principals, principals'</i>
9	boarding	253	0.57%	<i>board, boarding, boards</i>
10	staff	252	0.57%	<i>staff, staffs</i>
11	provide	234	0.52%	<i>provide, provided, providence, provider, providers, provides, providing</i>
12	curriculum	227	0.51%	<i>curriculum, curriculums</i>
13	successful	213	0.48%	<i>success, successes, successful, successfully, succession</i>
14	director	188	0.42%	<i>director, directorate, directors, directors'</i>
15	professionals	184	0.41%	<i>professional, professionalism, professionally, professionals</i>
16	candidate	178	0.40%	<i>candidate, candidates</i>
17	support	167	0.37%	<i>support, supported, supporting, supportive, supports</i>
18	academic	144	0.32%	<i>academic, academically, academics</i>
19	position	133	0.30%	<i>position, positioned, positioning, positions, position', positive, positively</i>
20	vision	132	0.30%	<i>vision, visioning</i>
21	strategic	131	0.29%	<i>strategic, strategically</i>
22	within	130	0.29%	<i>within</i>
23	strong	128	0.29%	<i>strong</i>
24	policies	123	0.28%	<i>policies, policy</i>
25	programme	121	0.27%	<i>programme, programmer, programmes</i>
26	british	117	0.26%	<i>british, british'</i>
27	primary	114	0.26%	<i>primary</i>
28	promote	113	0.25%	<i>promote, promoted, promoter, promotes, promoting, promotion, promotional</i>
29	opportunities	112	0.25%	<i>opportunities, opportunity</i>
30	campus	107	0.24%	<i>campus, campuses, campuses'</i>
31	leading	103	0.23%	<i>leading, leads</i>
32	works	99	0.22%	<i>working, works, works'</i>
33	environment	98	0.22%	<i>environment, environments</i>
34	college	89	0.20%	<i>college, colleges</i>
35	current	89	0.20%	<i>current, currently</i>
36	secondary	86	0.19%	<i>secondary</i>
37	leader	85	0.19%	<i>leader, leaders</i>
38	senior	84	0.19%	<i>senior, seniority</i>
39	english	83	0.19%	<i>english</i>
40	local	81	0.18%	<i>local, locality, locally</i>
41	accounts	79	0.18%	<i>account, accountabilities, accountability, accountable, accounting, accounts</i>
42	knowledge	79	0.18%	<i>knowledge, knowledgeable</i>
43	appropriate	79	0.18%	<i>appropriate, appropriately</i>
44	outstanding	77	0.17%	<i>outstanding, outstanding'</i>
45	world	77	0.17%	<i>world</i>
46	children	75	0.17%	<i>children</i>
47	process	74	0.17%	<i>process, processes</i>
48	range	70	0.16%	<i>range, ranging</i>
49	headteacher	67	0.15%	<i>headteacher, headteachers</i>
50	mission	59	0.13%	<i>mission</i>

APPENDIX II

OVERVIEW OF INTERVIEWEES

**RECRUITMENT CONSULTANTS (3)
INTERNATIONAL SCHOOL HEADS (25)**

RECRUITMENT CONSULTANT INTERVIEWS (3)

INTERVIEWEE	DESCRIPTION
AW	Director of mid-sized UK-based consultancy serving the global international schools market. A former Head of two international schools. Early 50's, male.
AM	Owner of small bespoke UK-based consultancy, primarily recruiting to senior posts at top-tier schools (including UK independent schools). Interviewee is an experienced former Head of UK schools and was previously Director of Schools for Nord Anglia.
AD	Senior recruitment agent for a large consultancy with significant global presence amongst international schools. Male, early 40's. An experienced recruiter with corporate sector experience.

INTERVIEWS WITH SCHOOL HEADS (25)

INTERVIEWEE	DESCRIPTION	JOB TITLE	TENURE AS HEAD	QUALIFICATIONS	SCHOOL MEMBERSHIPS	TYPE OF SCHOOL
C1	Late-sixties American male. Experienced Principal with several decades of international experience across a range of countries and contexts.	Principal	20+ Years	PhD (Education)	WASC	For-profit; privately owned.
C2	Mid-forties British female. Long-term Head. Second overseas post.	Head	15-20 Years	B.Ed, MA	CIS, IBO	For-profit; privately owned.
C3	Late-thirties British male. Head of a mixed curriculum school offering local and international programmes. Also Director of an associated training company associated with the school.	Principal	Less than 5 Years	PGCE	None	For-profit; privately owned.
C4	Mid-fifties British male. Founding Head of a mid-sized for-profit privately owned international school; was in last term prior to retirement at time of interview.	Principal	15-20 Years	BA, MA (Education)	BSA, CIS, FOBISIA	For-profit; privately owned.
C5	Mid-forties British male. Long-term Head of a small corporately owned for-profit international school. Previous shareholder in school before sale to corporate group.	Principal	10-15 Years	PGCE	BSO, CIS, FOBISIA, IBO	For-profit; corporate.
C6	Late-fifties Australian male. Experienced international and UK school Head, retired at time of interview. A co-owner in a group of international schools.	Director	15-20 Years	PGCE, MA	BSO, CIS, FOBISIA, IBO	For-profit; corporate.
C7	Early-forties female. First Headship of a small IB school.	Head	Less than 5 Years	PGCE, MBA	IBO	For profit; privately owned.
C8	Mid-fifties Australian male. Experienced international school Head, running a large IB curriculum school across three campuses.	Executive Principal	15-20 Years	PhD (Education)	IBO	For profit; privately owned.
C9	Late-fifties Australian male. Experienced Head currently running an IB curriculum school; extensive previous experience in not-for-profit contexts.	Head	20+ Years	B.Ed	CIS, IBO, NEASC	For-profit; recently purchased by a corporate group
C10	Mid-fifties British male. Founding Head of a for-profit privately owned group of international schools; group owned by a local corporation. British and IB curriculum.	CEO	10-15 Years	PGCEi NPQH	CIS, BSO, FOBISIA	For-profit; privately owned group of international schools
C11	Mid-forties British male. Internal appointment to a small IB Curriculum school.	Head	Less than 5 Years	PGCE, NPQH	CIS, IBO	For-profit; corporate.
C12	Mid-fifties Thai female, Head of a small school offering an international curriculum to local children. Formerly a Ministry of Education civil servant.	Principal	5-10 Years	PhD (Education)	None	For-profit; family owned.
C13	Late-fifties British male. First overseas Headship, brought in by UK-based franchise holder (where he was Deputy Head) to turnaround a failing privately owned for-profit British international school.	Head	Less than 5 Years	PGCE, MA	BSA, CIS, FOBISIA	For-profit franchise; privately owned.

APPENDIX II: INTERVIEWS WITH SCHOOL HEADS (25) CONTINUED:

INTERVIEWEE	DESCRIPTION	JOB TITLE	TENURE AS HEAD	QUALIFICATIONS	SCHOOL MEMBERSHIPS	TYPE OF SCHOOL
C14	Mid-fifties British female. Extensive Headship experience and a former Director of an international school accreditation body; returned to Headship of a small not-for-profit IB curriculum school.	Principal	15-20 Years	EdD, Diploma in Business Administration	CIS, EARCOS, IBO, WASC	Not-for-profit
C15	Late-fifties New Zealand male. Head of a very large British and IB curriculum not-for-profit school.	Head	15-20 Years	B.Ed, PGCE	FOBISIA, IBO	Not-for-profit
C16	Mid-fifties British male. CEO of a very large British, IB and French curriculum not-for-profit school (with financial backing from companies the staff of whose children it was set up to educate).	CEO	15-20 Years	EdD	CIS, FOBISIA, WASC	Not-for-profit
C17	Mid-fifties US-Taiwanese female. Principal of a large private Christian Taiwanese high school running international programmes.	Principal	5-10 Years	B.Ed	None	Not-for Profit
C18	Mid-fifties US-Chinese female. Owner and Head of a very small not-for-profit Christian international school offering a US curriculum.	Principal	5-10 Years	PhD (Education)	WASC	Not-for-profit
C19	Late-forties British male. First overseas posting. UK independent school background. Mid-sized British school.	Head	5-10 Years	BA, PGCE	CIS, FOBISIA	For-profit franchise; privately owned.
C20	Mid-fifties Australian male. Experienced international school Head, running a large not-for-profit IB curriculum school.	CEO	15-20 Years	B.Ed, M.Ed	FOBISIA, IBO	Not-for-profit
C21	Early-forties Canadian male. Second Headship, currently in a large IB World school.	Head	Less than 5 years	M.Sc	CIS, NEASC, IBO	Not-for-profit
C22	Late-thirties British male. Head of a small Primary British curriculum campus.	Head	Less than 5 Years	B.Ed, PGCE	BSO, CIS	For-profit; corporate.
C23	Early sixties British male. Head of a small K-11 British curriculum school; appointed to turnaround a failing corporately owned school.	Head	20+ Years	BA, MA, PGCE	BSO, CIS, FOBISIA, IBO	For-profit; corporate.
C24	Mid-fifties British male. Experienced international school Head, running a mid-sized British curriculum school; recently purchased from a private owner by a large corporation.	Head	15-20 Years	PGCE, MA	BSA, BSO, CIS, FOBISIA, IBO	For-profit; corporate.
C25	Mid-fifties Australian male. Experienced Head running a large island-based school; part of a small group of schools all located within the same country.	Principal	10-15 Years	B.Ed, MA	CIS, WASC	For-profit; privately owned.

BSA – Boarding Schools Association; **BSO** - British Schools Overseas; **CIS** – Council of International Schools; **EARCOS** - East Asian Region Council Overseas Schools; **IBO** – International Baccalaureate Organisation; **NEASC** – New England Association of Schools & Colleges; **WASC** - Western Association of Schools and Colleges

APPENDIX III

COPY OF FULL ONLINE QUESTIONNAIRE

APPENDIX III - ONLINE SURVEY

International Schools in Practice (PhD Research)

1. Introduction

Introduction Text

INTRODUCTION

First and foremost, thank you for your willingness to complete this survey. Your assistance is very much appreciated. The questionnaire should take between 15-20 minutes to complete.

The primary aim of the survey is to identify different managerial practices that may or may not be common across the field of international schooling. To that end the survey covers the following domains:

- School Ownership
- School Governance
- School Leadership
- Strategy, Marketing & Development
- Human Resource Management
- Performance Management
- Budgeting

Please rest assured that all responses are completely anonymous and will only be reviewed in the aggregate; school name is requested for the purpose of identifying possible candidates for future more in-depth research, but please leave this blank if preferred. Where relevant a 'Prefer Not to Say' option is also available. You can exit the survey (withdraw from the research) at any point and need not answer all questions.

Comments are entirely optional, though please feel free to add any detail that you feel is pertinent to contextual understanding.

In moving onto the next page please note that you are giving your informed consent to the use of any data you provide in anonymous form in the final thesis. As noted, no individual or school will be identifiable in the final thesis. Please refer to the Information Sheet supplied with the e-mail linking to this survey for more information.

If you have further questions or would like to contact Keele University for more information my supervisor is Professor Steve Cropper, he can be contacted on: s.a.cropper@keele.ac.uk

Once again, many thanks for taking the time to complete this survey.

Denry Machin
Keele University, PhD Candidate

2. BASIC INFORMATION

School Name (Optional):

What is the school's current student roll?

Current Roll

International Schools in Practice (PhD Research)

Does the school belong to a larger group of schools (Cognita, GEMS, Dulwich, Tenby etc)?

- Yes
 No
 Prefer Not to Say

To which group does the school belong:

Which description best fits the school's ownership structure?

- Corporate/Group Owned (GEMS, Cognita etc)
 Charitable Trust/Foundation
 Privately Owned/Proprietorship
 Public Limited Company
 Other
 Prefer Not to Say

Other (Please Specify)

3. School Ownership

Do the school owners or their proxy/representative have a functional day-to-day role at the school?

- Yes
 No
 Prefer Not To Say

Comments:

4. School Ownership

Does this role have a formal title? If so, what?

- Yes
 No

Title/Titles:

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What elements of school operations does this role/involvement encompass?

(Tick all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Development | <input type="checkbox"/> Education |
| <input type="checkbox"/> ALL | <input type="checkbox"/> Marketing |
| <input type="checkbox"/> Purchasing | <input type="checkbox"/> Community Liaison |
| <input type="checkbox"/> Operations/Logistics | <input type="checkbox"/> Finance |
| <input type="checkbox"/> Legal Operations | |

Other (Please Specify)

5. Profit Status

Does the school operate:

- For-Profit
- Not-For-Profit
- Other (or Prefer Not to Say)

6. Profit Share

As a for-profit/other does the school offer profit share to any of these staff:

	Yes	No	Prefer not to say
Head	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Senior Leadership	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teachers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bursar/Business Manager	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-Academic Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

7. Franchising

Does the school license a franchise from another institution (Shrewsbury, Epsom, Harrow etc)?

- Yes
- No
- Prefer Not To Say

International Schools in Practice (PhD Research)

8. Franchising

Have any current members of staff ever worked for the franchisor (i.e Epsom, UK)? If so, what position/s do they currently hold at the franchised school?

- Yes
 No

Current Position:

Do the franchise owners or their proxy/representative have an operational involvement in the school?

- Yes
 No
 Prefer Not To Say

Comments:

9. Franchising

What elements of school operations does this role/involvement of the franchise holders encompass?

(Tick all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Legal Operations | <input type="checkbox"/> Community Liaison |
| <input type="checkbox"/> Finance | <input type="checkbox"/> Purchasing |
| <input type="checkbox"/> Education | <input type="checkbox"/> ALL |
| <input type="checkbox"/> Operations/Logistics | |

Other (Please Specify)

10. School Governance

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**Which of the following stakeholders are represented on the school's governing body?
(Tick all that apply)**

- | | |
|--|---|
| <input type="checkbox"/> Proxies/Representatives of the School Owner | <input type="checkbox"/> Representatives of Franchise Owner |
| <input type="checkbox"/> Parents | <input type="checkbox"/> Teachers |
| <input type="checkbox"/> Representatives of School Operating Company | <input type="checkbox"/> Senior Management (exc Head) |
| <input type="checkbox"/> School Head/Principal | <input type="checkbox"/> Relatives of the School Owner |
| <input type="checkbox"/> School Owner | <input type="checkbox"/> Prefer not to say |

Other/Comments:

For representatives on the governing body NOT employed by the school, what are their backgrounds?

(Tick all that apply)

- | | | |
|---|---|--|
| <input type="checkbox"/> Entertainment | <input type="checkbox"/> Banking/Finance | <input type="checkbox"/> IT/Communications |
| <input type="checkbox"/> Recruitment | <input type="checkbox"/> Corporate Management | <input type="checkbox"/> Distribution |
| <input type="checkbox"/> Sales & Marketing | <input type="checkbox"/> Law | <input type="checkbox"/> Retail |
| <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Education | <input type="checkbox"/> Armed Forces |
| <input type="checkbox"/> Oil/Gas Industries | <input type="checkbox"/> Unsure/Prefer not to say | |

Other (please specify)

11. Governance

Is a summary of school financial information provided to teachers?

- Yes
 No
 Prefer not to say

Comments:

Is a summary of school financial information provided to parents?

- Yes
 No
 Prefer not to say

Comments:

International Schools in Practice (PhD Research)

12. Governance & Strategy

Which of the following stakeholders have a DIRECT involvement in determining school strategy: (tick all that apply)

- Parents
- Teachers
- Students
- School management company
- School owner/s
- School board
- School Head
- Franchise Owners
- Other (please specify)

To whom does the Head DIRECTLY report on STRATEGIC matters?

- Prefer Not to Say
- No One
- School Owner
- Board Chair
- Representative of Management Company
- Franchise Owner

Other (please specify)

To whom does the Head DIRECTLY report on day-to-day OPERATIONAL matters?

- Representative of Management Company
- No One
- School Owner
- Board Chair
- Franchise Owner
- Prefer Not to Say

Other (please specify)

International Schools in Practice (PhD Research)

Which of the following are set, at the strategic level, as criteria for school success?

(Tick all that apply)

- Educational Targets
- International mix of students
- Professional development of staff
- Creative Performances/Exhibitions
- Profit Targets
- Teacher recruitment targets (quantity)
- Prefer Not To Say
- Sporting Performance
- International mix of staff
- Teacher recruitment targets (quality)
- Performance within budget
- No Success Criteria Determined

Other (please specify)

13. LEADERSHIP PROFILE

Which of the following postgraduate qualifications does the current Head/Principal hold?

- Doctorate (PhD/EdD)
- National Programme for Qualification of Head teachers (NPQH)
- International Leadership and Management Programme (ILMP)
- Principals Training Centre Qualifications (PTC)
- Masters of Business Administration (MBA)
- Middle Leaders Development Programme (MLDP)
- Masters
- Unsure/Prefer not to say

Other (Please Specify)

International Schools in Practice (PhD Research)

Are any of the following qualifications requirements (or formally considered advantageous) for senior management positions?

- Middle Leaders Development Programme (MLDP)
- Principals Training Centre Qualifications (PTC)
- National Programme for Qualification of Head teachers (NPQH)
- Masters
- International Leadership and Management Programme (ILMP)
- Masters of Business Administration (MBA)
- None of these required
- Other (please specify)

Does the school operate a distributed leadership philosophy?

Not at all Partially, with limited success Partially, with some success Fully, and mostly effective Fully, and highly effective

Other (Please Specify)

Do you have any of the following positions in the school/organisation:

- Chief Executive Officer (CEO)
- Director of School/s
- Chief Operations Officer
- Chief Financial Officer
- None

Other (please specify)

14. Marketing

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Does the school employ a Director of Marketing (or equivalent)?

- Yes
 No
 Prefer Not To Say

Comments:

15. Marketing

Is the Director of Marketing local or expatriate?

- Local
 Local (Overseas Educated)
 Expatriate
 Prefer Not To Say

Comments:

16. Marketing

Was the expatriate Director of Marketing recruited offshore specifically for this role?

- Yes
 No

Comments:

17. Marketing

Does the school operate a parental satisfaction survey?

- Yes
 No
 Prefer Not To Say

18. Marketing

International Schools in Practice (PhD Research)

How often is the parental satisfaction survey undertaken?

- Annually
- Biennially
- Prior to inspection/accreditation visits only
- Ad hoc
- Other (Please Specify)

19. Marketing

Does the school operate a student satisfaction survey?

- Yes
- No
- Prefer Not To Say

20. Marketing

How often is the student satisfaction survey undertaken?

- Annually
- Biennially
- Prior to inspection/accreditation visits only
- Ad hoc
- Other (Please Specify)

21. Strategy & Marketing

Does the school employ a Director of Development (or equivalent)?

- Yes
- No
- Prefer Not To Say

Comments:

22. Strategy & Marketing

International Schools in Practice (PhD Research)

What responsibilities fall within the Director of Development's (or equivalent) remit?

(Tick all that apply)

- Alumni
- Buildings Projects
- Endowments
- Events Management
- Fundraising
- Corporate Social Responsibility
- Marketing
- Communication
- Other (please specify)

Is the Director of Development (or equivalent) local or expatriate?

- Local
- Local (Overseas Educated)
- Expatriate
- Prefer Not To Say

Comments:

23. Strategy & Marketing

Was the expatriate Director of Development recruited offshore specifically for this role?

- Yes
- No

Comments:

24. Strategy & Marketing

International Schools in Practice (PhD Research)

Does the school engage in benchmarking/comparison activities with/against other schools with regard to: (Tick all that apply)

- Academic Performance
- Facilities
- School Fees
- Pay & Conditions
- Teacher Qualifications
- Other (please specify)

Approximately what percentage of revenue is the school's marketing budget? (Please answer 'Prefer Not to Say' if the information is considered commercially sensitive)

- Less Than 1%
- 1-2% annually
- 3-4% annually
- 5-6% annually
- 7-8% annually
- 9-10% annually
- Greater than 10% annually
- Unsure
- Prefer not to say

Comments:

International Schools in Practice (PhD Research)

Has the school ever used any of the following tools as part of strategy formation/implementation?

	Yes	No	Unsure What This Is
Income Elasticity of Demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SWOT Analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Six Sigma	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Geo-Demographic Analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Balanced Scorecard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total Quality Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PEST/LE Analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price Elasticity of Demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formal Market Research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A Forced ranking appraisal system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ansoff's Matrix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Porter's Generic Strategies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

Does the school use/has the school ever used the services of any outside consultancies with regard to development planning?

- Yes (include here staff from a franchise owner and/or management company)
 No
 Planned for the future
 Prefer not to say

Comments:

25. Strategy & Marketing

International Schools in Practice (PhD Research)

Were the consultants:

(Tick all that apply)

- External - General Educational Consultants
- External - Marketing Consultants
- External - Educational Management Consultants
- External - Financial Consultants
- External - General Management Consultants
- Internal - Staff From the School's Management Company
- Internal - Staff from the School's Franchise Owner
- Other (Please Specify)

26. Human Resources

Does the school employ a Human Resources Manager?

- Yes
- No
- Prefer Not To Say

27. Human Resource Manager - Role & Responsibilities

What responsibilities fall within the Human Resource Managers remit?

(Tick all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Payroll | <input type="checkbox"/> Contract Administration |
| <input type="checkbox"/> Staff Benefits Administration | <input type="checkbox"/> Discipline Procedures (Local Staff) |
| <input type="checkbox"/> Staff Welfare | <input type="checkbox"/> Discipline Procedures (Expat Staff) |
| <input type="checkbox"/> Staff Induction (Local Staff) | <input type="checkbox"/> Recruitment |
| <input type="checkbox"/> Staff Induction (Expat Staff) | <input type="checkbox"/> Appraisal (Local Staff) |
| <input type="checkbox"/> PD (Local Staff) | <input type="checkbox"/> Appraisal (Expat Staff) |
| <input type="checkbox"/> PD (Expatriate) | <input type="checkbox"/> ALL |
| <input type="checkbox"/> Other (please specify) | |

International Schools in Practice (PhD Research)

Is the Human Resource Manager local or expatriate?

- Expatriate
- Prefer Not To Say
- Local (Overseas Educated)
- Local

Comments:

28. Human Resource Manager - Recruitment

Was the expatriate Human Resource Manager recruited offshore specifically for this role?

- Yes
- No
- N/A

Comments:

29. Contracts & Staff Turnover

How long is the usual first contract length for expatriate staff?

- 1 Year
- 2 Years
- 3 Years
- 4 Years
- 5+ Years
- Permanent
- Other (Please Specify)

International Schools in Practice (PhD Research)

If a member of staff is offered a contract extension, usually how long are those extensions?

- 1 Year
- 2 Years
- 3 Years
- 4 Years
- 5+ Years
- No Extension Offered
- Permanent
- Other (Please Specify)

How long (approximately) is average academic staff tenure at your institution?

- 1 Year
- 2 Years
- 3-4 Years
- 5-6 Years
- 7-8 Years
- 9-10 Years
- 10 Years Plus
- Other (please specify)

Approximately what is your average annual academic staff turnover (%):

- Less than 5% annually
- Between 6-10% annually
- Between 11-15% annually
- Between 16-20% annually
- Greater than 20% annually
- Unsure
- Prefer not to say

Comments:

International Schools in Practice (PhD Research)

Does the school operate quotas with regard to the numbers/proportions of staff employed on certain pay grades?

- Yes
 No
 Prefer Not To Say

Other (please specify)

Does the school offer performance-related pay to academic staff?

- Prefer not to say
 Yes
 No

Comments:

Does the school operate a teacher satisfaction survey?

- Yes
 No
 Prefer Not To Say

30. Human Resources

How often is the teacher satisfaction survey undertaken?

- Annually
 Biennially
 Prior to inspection/accreditation visits only
 Ad hoc
 Other (Please Specify)

31. Appraisal System/Performance Review

Do you currently have an appraisal system?

- Yes
 No
 Prefer not to say

International Schools in Practice (PhD Research)

32. Appraisal System/Performance Review

What language/title is used to describe this appraisal system?

- Performance Management Review
- Performance Development Review
- Professional Development Review
- Appraisal
- Other (Please Specify)

33. Appraisal System/Performance Review

Is your [Q55] system linked explicitly to professional development?

Strongly	Loosley	Not at all	Prefer not to say
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

Is your [Q55] system linked explicitly to pay/progression on the salary scale?

Strongly	Loosley	Not at all	Prefer not to say
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

Is your [Q55] system linked explicitly to payment of an annual bonus?

Strongly	Loosley	Not at all	Prefer not to say
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

Does the school used 'forced ranking' as part of its [Q55] process?

- Yes
- No
- Unsure what 'forced ranking' is
- Prefer not to say

Comments:

International Schools in Practice (PhD Research)

What targets are the following staff appraised against?

	Personal Development Targets	General Educational Targets	Examination Performance Targets	Financial/Budget Targets	Student Roll Targets	None	Other
Middle Managers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior Managers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Head Teacher/Principal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Where Other Selected Please Specify:

34. Budgets

Making a distinction between simple ratification of budgets and the actual process of determining and setting budgets, who determines the school's budget/s?

- The school owner/s
- The school board
- A corporate management company
- School management (Head and Senior Leaders)

Comments:

Do middle managers (Heads of Department/Phase Co-ordinators) have budgetary responsibility?

- Yes
- No
- Prefer not to say

Comments:

International Schools in Practice (PhD Research)

Are budgetary targets used to evaluate the performance of the:

	Yes	No	N/A
Senior Managers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business Manager	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Head/Principal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Middle Managers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Director of Development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Director of Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial Manager	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teachers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

35. Thank You

Many thanks for taking the time to complete this survey. Without your efforts PhD research of this nature would not be possible; the time, thought, care and attention you have given is very much appreciated.

SurveyMonkey does not allow the collation of e-mail addresses so if you would like a summary of the research findings please e-mail d.machin@keele.ac.uk. Once the data is collated and analysed a summary will be sent to you.

It would be useful if in that e-mail you could also indicate whether you are willing to be interviewed as part of the second stage of this research. The interviews would delve more deeply into some of the issues raised in this survey.

To save time simply e-mail Yes or No with your name and contact details to the address above, I will do the rest.

Once again, thank you for taking the time to complete this survey.

Denry Machin
Keele University, PhD Candidate

APPENDIX IV

COPIES OF CONSENT FORMS, PERMISSIONS, & INTRODUCTORY LETTERS

APPENDIX IVai: PHD INTERVIEW REQUEST – SUBSEQUENT TO ONLINE QUESTIONNAIRE

Example of e-mail sent to request an interview appointment:

Dear <Heads name>⁶⁰

I hope this e-mail finds you well.

Many thanks for taking the time to complete the online questionnaire related to my PhD, it is very much appreciated. Thank you also for indicating your willingness to be interviewed face-to-face for the next stage of my research.

In short, the primary aim of my research is to identify the pressures of business-like thinking within education, and indeed whether such thinking is common across the field of international schooling. To that end, building on the themes of the questionnaire, the interview will cover the following domains:

School Ownership School Leadership Performance Management
Strategy, Marketing & Development Human Resource Management

The interview would take approximately one hour, and, as I am based in Bangkok⁶¹, I will happily travel to your school at a time of your convenience.

The research is, of course, entirely confidential and I will respect the need to stay away from any questions that may be commercially sensitive. If you agree to participate please be assured that you nor your school will be identifiable in my thesis, any quotes used will be anonymous and the context only considered in aggregate with other schools of a similar type. You will be able to withdraw from the process at any point, and can ask to move on from any topic you do not wish to answer questions on. I will ask whether you are happy for the interview to be tape-recorded. I will confirm at the end of the interview that you are happy for the use of anonymous quotes from the interview.

I attach to this e-mail an Information Sheet and an Informed Consent Form that give further details. The Informed Consent Form we can sign before commencement of the interview.

If you have further questions or would like to contact Keele University for more information my supervisor is Professor Steve Cropper, he can be contacted on: s.a.cropper@keele.ac.uk

Many thanks in advance for your time. I look forward to hearing from you.

Denry Machin
Keele University, PhD Candidate

⁶⁰ Name to be inserted as appropriate

⁶¹ To be changed dependent on location

International Schools in Practice (PhD Research)

1. Introduction

Introduction Text

INTRODUCTION

First and foremost, thank you for your willingness to complete this survey. Your assistance is very much appreciated. The questionnaire should take between 15-20 minutes to complete.

The primary aim of the survey is to identify different managerial practices that may or may not be common across the field of international schooling. To that end the survey covers the following domains:

- School Ownership
- School Governance
- School Leadership
- Strategy, Marketing & Development
- Human Resource Management
- Performance Management
- Budgeting

Please rest assured that all responses are completely anonymous and will only be reviewed in the aggregate; school name is requested for the purpose of identifying possible candidates for future more in-depth research, but please leave this blank if preferred. Where relevant a 'Prefer Not to Say' option is also available. You can exit the survey (withdraw from the research) at any point and need not answer all questions.

Comments are entirely optional, though please feel free to add any detail that you feel is pertinent to contextual understanding.

In moving onto the next page please note that you are giving your informed consent to the use of any data you provide in anonymous form in the final thesis. As noted, no individual or school will be identifiable in the final thesis.

If you have further questions or would like to contact Keele University for more information my supervisor is Professor Steve Cropper, he can be contacted on: s.a.cropper@keele.ac.uk

Once again, many thanks for taking the time to complete this survey.

Denry Machin
Keele University, PhD Candidate

2. BASIC INFORMATION

School Name (Optional):

What is the school's current student roll?

Current Roll

APPENDIX IVa: REQUEST TO COMPLETE ONLINE QUESTIONNAIRE

Example of e-mail sent to request completion of online questionnaire:

Dear <Heads name>⁶²

I hope this e-mail finds you well. Further to the email below⁶³, thank you for your willingness to complete the online questionnaire related to my PhD.

My PhD is an exploration of the 'business of education' but more specifically relates to the role of Heads within international schools, in essence asking whether the role is increasingly demanding of business-like skills.

The primary aim of the online questionnaire is to identify different managerial practices that may or may not be common across the field of international schooling. To that end the questionnaire covers the following domains:

- School Ownership
- School Governance
- School Leadership
- Strategy, Marketing & Development
- Human Resource Management
- Performance Management

The questionnaire should take between 15-20 minutes to complete. All responses are completely anonymous and will only be reviewed in the aggregate. The school name is requested for the purpose of identifying possible candidates for future more in-depth research, but please leave this blank if preferred. Comments are entirely optional, though please feel free to add any detail that you feel is pertinent to contextual understanding. Where relevant a 'Prefer Not to Say' option is also available. **You can exit the questionnaire at any point and need not complete all questions.**

If you would like to preview the questions you can find the questionnaire at:

<https://www.surveymonkey.com/s/G96CYDR>

If you agree to participate please be assured that you nor your school will be identifiable in my thesis, any quotes used will be anonymous and the context only considered in aggregate with other schools of a similar type. A summary of the data will be made available once the questionnaire is complete.

If you have further questions or would like to contact Keele University for more information my supervisor is Professor Steve Cropper, he can be contacted on: s.a.cropper@keele.ac.uk. Many thanks in advance for your time. I look forward to hearing from you.

Denry Machin
Keele University, PhD Candidate

⁶² Name inserted as appropriate

⁶³ Example here is of a follow-up to a previous introductory e-mail (see Interview Request V1); other letters will include different openings dependent on the point of introduction and whether potential participant is previously known to me.

APPENDIX IVb: PHD INTERVIEW REQUEST – INTRODUCTION LETTER (MH)

Example of e-mail to be sent by Dr Mark Hensman on my behalf to make appropriate introductions and to request support with my PhD research:

Dear Andy,

Greetings and best wishes.

May I commend to you the work of Denry Machin who was Head of Upper School at Harrow Bangkok 2003-2012. Denry has been working on a doctorate with Keele University (UK) for the last 18 months and is now at the research stage which will involve a questionnaire of Heads/Principals of schools in order to gather the data he needs. The primary aim of the questionnaire is to identify different managerial practices that may or may not be common across the field of international schooling. To that end the questionnaire covers the following domains:

- School Ownership
- School Governance
- School Leadership
- Strategy, Marketing & Development
- Human Resource Management
- Performance Management

The questionnaire should take between 15-20 minutes to complete.

All responses are completely anonymous and will only be reviewed in the aggregate. The school name is requested for the purpose of identifying possible candidates for future more in-depth research, but please leave this blank if preferred. Comments are entirely optional, though please feel free to add any detail that you feel is pertinent to contextual understanding. Where relevant a 'Prefer Not to Say' option is also available. You can exit the questionnaire at any point and need not complete all questions.

A summary of the data will be made available once the questionnaire is complete.

If you would like to preview the questions you can find the questionnaire at:

<https://www.surveymonkey.com/s/G96CYDR>

If you are willing to complete the questionnaire and would be willing to be interviewed as part of the research, Denry would be most grateful. You can respond to Denry directly on d.machin@keele.ac.uk

There is, of course, no compulsion for you to undertake the research. If you have further questions or would like to contact Keele University for more information Denry's supervisor is Professor Steve Cropper, he can be contacted on: s.a.cropper@keele.ac.uk

With thanks and best wishes...Mark

Example of e-mail sent to request an interview appointment:

Dear <Heads name>⁶⁴

I hope this e-mail finds you well. Further to the email below⁶⁵, I write to ask if you would be willing to be interviewed as part of a PhD research project.

As you may or may not recall, we met on a few occasions when I was Head of Upper School at Harrow Bangkok. I left Harrow in 2012 and have since been working on a Phd with Keele University (UK).

My Phd is an exploration of the 'business of education' but more specifically relates to the role of Heads within international schools, in essence asking whether the role is increasingly demanding of business-like skills. As somebody working as a Head in an international school context would you be willing to be interviewed as a subject for that research topic?

The interview would take approximately one hour, and, as I am based in Bangkok⁶⁶, I will happily travel to your school at a time of your convenience. The research is, of course, entirely confidential and I will respect the need to stay away from any questions that may be commercially sensitive. If you are agreeable then ahead of the interview I will send you a more detailed information sheet and a permission slip so that you can grant your informed consent to the interview.

In short, the primary aim of my research is to identify managerial practices that may or may not be common across the field of international schooling. To that end the interview will cover the following domains:

School Ownership School Leadership Performance Management
Strategy, Marketing & Development Human Resource Management

If you agree to participate please be assured that you nor your school will be identifiable in my thesis, any quotes used will be anonymous and the context only considered in aggregate with other schools of a similar type. You will be able to withdraw/opt-out from the process at any point, and can ask to move on from any topic you do not wish to answer questions on. I will ask whether you are happy for the interview to be tape-recorded. I will confirm at the end of the interview that you are happy for the use of anonymous quotes from the interview.

If you have further questions or would like to contact Keele University for more information my supervisor is Professor Steve Cropper, he can be contacted on: s.a.cropper@keele.ac.uk. Many thanks in advance for your time. I look forward to hearing from you.

Denry Machin
Keele University, PhD Candidate

⁶⁴ Name inserted as appropriate

⁶⁵ Example here is of a follow-up to a previous introductory e-mail (see Research Request); other examples may include different openings dependent on nature of introduction and whether the research participant is previously known to me.

⁶⁶ To be changed as location demands, indicating when I will be travelling to potential interviewees potential location.

APPENDIX IVd: PHD INFORMATION SHEET (ISSUED IN ADVANCE OF INTERVIEWS)

ABOUT ME:

Formerly Head of Upper School at Harrow International School, Bangkok, I am now working as Projects Manager for Harrow International Management Services and am undertaking a PhD with Keele University (UK).

PURPOSE OF THE STUDY:

My research focus is an exploration of the 'business of education', covering the growth of the international school market, the underlying economics and the skills required to be a successful Head in this rapidly changing market. Specifically, my study concerns the role of Heads within international schools, asking whether the role is increasingly demanding of business-like skills.

You have been invited to take part in this research because, as a Head working internationally, it is hoped that you will be able to offer insight into the pressures of international schools Headship and whether those pressures are changing as a result of any sense of business thinking and/or commercial pressure.

My supervisor for the PhD is Professor Steve Cropper. If you have any questions or concerns about the nature of the research he can be contacted via: s.a.cropper@keele.ac.uk

INTERVIEW OUTLINE:

The interview should last approximately one hour. At the interview I will ask you for permission to record our conversation and will ask that you confirm on a permission sheet that recording has been allowed if you agree to such. The recorder I use will be passcode locked and does not have Wi-Fi capability, thus reducing security issues. Back-up copies of the interview will be stored in encrypted form. Prior to transcribing, any identifying information will be removed from the recording and the filename created such as to preserve anonymity. To further ensure confidentiality I will undertake all transcriptions myself. At the end of the interview I will ask you to reconfirm, via signature, the anonymised use of quotes.

Whilst I have a series of topics I wish to discuss my hope is that the interview will be more of a discursive conversation than a structured series of questions and responses. You will be able to opt-out of the interview process at any point and can ask to move on from any topics on which you do not wish to answer questions.

CONFIDENTIALITY:

Confidentiality is obviously an important concern. My research methodology has undergone scrutiny by the University ethics committee and progress onto the interview stage has only been granted on the basis of having correct and proper procedures in place to ensure your confidentiality.

Please be assured that my research does not require a record of the school or individual Heads name beyond my own records for administrative purposes. You, nor your school, will be identifiable in my final thesis, all data will only be used in aggregate or abstract. At no point will you be quoted by name or the school used as an identifiable case study. Any quotes used will be anonymised. From the various interviews, of which I intend to conduct approximately 30, I will analyse the findings to draw out any commonalities or notable differences; your insights will be used, in the aggregate, as part of this data set.

FEEDBACK:

If desired I will provide you with an executive summary of my findings; it is anticipated that my findings will be complete and approved for wider distribution in late 2015.

Many thanks in advance for your time.

APPENDIX IVe: PHD INFORMED CONSENT FORM (PRIOR TO INTERVIEWS)

PURPOSE OF THE STUDY:

In very board terms, my PhD is an exploration of the 'business of education', covering the growth of the international school market, the underlying economics and the skills required to be a successful Head in this rapidly changing market. More specifically my research relates to the role of Heads within international schools, in essence asking whether the role as exercised in the private domain is increasingly demanding of business-like skills. My hope is that as a Head working internationally that you will be able to offer useful insight into the pressures of Headship and whether those pressures are changing as a result of any sense of corporatisation.

INFORMED CONSENT:

In agreeing to participate in this study I understand that:

- The findings will be submitted in partial fulfillment of the requirements for the degree of PhD at Keele University.
- That my participation is entirely voluntary.
- That I will not be identified by name in the final thesis or any subsequent publications.
- That all data collected will be limited to this use or other research-related usage as authorised by Keele University.
- All records will be kept confidentially, in the secure possession of the researcher.
- That the contact information of the researcher and his advisor have been made available to me along with a duplicate copy of this consent form.
- That the data I will provide will not be communicated in any way to my staff, to the school owners/governing body and in no way will be used as judgement of my performance.
- I understand that I may withdraw from the study at any point with no adverse repercussions.

In signing this form I agree to participate in the:

Online
Questionnaire


Interview

Both

Interviewee's Name:

Interviewee's Signature:

Researcher Signature



Date Signed:

APPENDIX IVfi: PHD INFORMED CONSENT FORM (FOR INTERVIEWS)

ABOUT ME:

Formerly Head of Upper School at Harrow International School, Bangkok, I am now working as Projects Manager for Harrow International Management Services and am undertaking a PhD with Keele University (UK).

PURPOSE OF THE STUDY:

My research focus is an exploration of the 'business of education', covering the growth of the international school market, the underlying economics and the skills required to be a successful Head in this rapidly changing market. Specifically, my study concerns the role of Heads within international schools, asking whether the role is increasingly demanding of business-like skills. You have been invited to take part in this research because, as a Head working internationally, it is hoped that you will be able to offer insight into the pressures of international schools Headship and whether those pressures are changing as a result of any sense of business thinking and/or commercial pressure.

My supervisor for the PhD is **Professor Steve Cropper**. If you have any questions or concerns about the nature of the research he can be contacted via: s.a.cropper@keele.ac.uk

INFORMED CONSENT:

I confirm that I have read the study Information Sheet and that I **give my informed consent to participate in the interview** process on the basis that:

- The data I provide will, in anonymised form, be used exclusively to inform the findings of Denry Machin's PhD thesis (entitled: The Corporatisation of International Schools) to be submitted to Keele University, and any publications authored or co-authored by Denry Machin directly arising from that thesis.
- My participation is entirely voluntary; no pressure, formal or otherwise, has been placed on me to take part.
- I will not be identified by name in the final thesis or any subsequent publications.
- All data collected will be limited to this use or other research-related usage as authorised by Keele University.
- All records will be kept confidentially, in the secure possession of the researcher.
- The contact information of the researcher and his advisor have been made available to me along with a duplicate copy of this consent form.
- The data I will provide will not be communicated in any way to my staff, to the school owners/governing body and in no way will be used as judgement of my performance.
- I may withdraw (opt-out) from the study at any point with no adverse repercussions.


Interviewee's Name:

--

Interviewee's Signature:

--

Researcher Signature



Date Signed:

APPENDIX IVfii: PHD INFORMED CONSENT FORM (INTERVIEWS – PART II)

For completion after interviews to confirm use of *anonymised* quotes

CONSENT TO USE QUOTES:

By signing below, I confirm that I understand that I am agreeing to *anonymised* quotes from the interview being used in the final thesis. I understand that I will not be identifiable in the final thesis, nor will my institution.

Interviewee's Name:

--

Interviewee's Signature:

--

Researcher Signature



Date Signed:

--

APPENDIX V

COPY OF INTERVIEW PROMPTS

GENERAL

1. For context, please provide a brief biography of your career to date, educational or otherwise.
2. Please briefly describe:
 - Your current role
 - The schools ownership/organisational structure
 - The organisational structure in relation to the franchise/brand owner.
3. Briefly outline, as you see them, the objectives of the school.
4. Does your current experience, in terms of the way the school is managed and run, differ in any way from previous experiences?
5. To five schools in Asia (in your opinion)

EXTERNAL RELATIONSHIPS

1. How often does the CEO/school owner/representatives of the management company visit?
2. How involved are the CEO/school owner/representatives of the management company in:
 - Educational Decisions
 - Commercial Decisions
3. What, if any, impact has the 'for-profit' label had on staff, students or parents?
4. Which external bodies accredit the school?

Why was that body chosen?

Has accreditation improved educational outcomes?

Has accreditation improved managerial processes?

HUMAN RESOURCES

1. What are the main responsibilities of the HR Manager?
2. Whose needs does the HR manager serve, staff or management?
3. Would you say that there has been an increase in demands on your teachers' time (number of lessons taught, class sizes, activity requirements, additional)? Where do these increasing demands come from?

APPRAISAL

1. Is your appraisal/PDR process based around a model of 'best practice'?
 - What domains of school life does that best practice include?
2. Do you use 360 Degree appraisal? Do teachers get to appraise their line managers/the Head?
3. What are the 'outcomes' of the appraisal process (PDR, Contracts etc)?

THE MARKET

1. What are your thoughts on the way the international schools market has evolved in recent years (growth in school numbers etc)?
2. Do you see this evolution represented in the competitiveness of the market?
3. How is this competition manifest? (processes, systems, marketing)
4. Do you talk to staff about the competitive nature of the market? Why?

CORPORATISATION

1. Would you say that schools are (in general) being run along more business lines?
2. Can you give any examples of business thinking within schools (this or others you are familiar with)?
3. What about internally, would you say that the internal processes of school **management** are becoming more business-like? In what regard?
4. What is your personal position on more business-like thinking in education? A good thing or a bad thing?
5. In your experience do you think there is any difference in the way for-profit/not-for-profit (etc) are run in terms of the extent of corporatisation?

SKILLS & EXPERIENCE

1. Do you think the skills/experiences demanded of Heads have changed?
2. As a result of these changes do you think there has been a commensurate change in the pressure on middle managers?
3. If you were advising somebody with aspirations towards Headship what skills/experiences would you be advising them to develop?

NETWORKS

1. Do any networks to which you belong (FOBISIA) etc but any sense of pressure on what you do as Head and how you do it? Coercive, normative, mimetic (do you feel any pressure to 'be like' other schools in the group?)

IDENTITY

1. So, given what you have noted about the changing nature of international schools how would you define your own roll – on a scale of 1-10, with 1 being a pure **educationalist** and 10 being a purely **business manager** how would you rate your current role?

(Time spent in classrooms/with children versus time spent on systems and policies)
2. Are there examples of what you are asked to do as a **business manager** conflict with your role as an **educationalist**?

APPENDIX VI

COPY OF CODING TABLE FOR RECRUITMENT DOCUMENTATION ANALYSIS

APPENDIX VI: CODING TABLE FOR RECRUITMENT DOCUMENT ANALYSIS

THEMES	WHAT DISCOURSES DO THE TEXTS EVIDENCE? DO THE TEXTS EVIDENCE HYBRID JOB/TASK REQUIREMENTS? DO THE TEXTS EVIDENCE EXTERNALLY IMPOSED MANAGERIALISM?						EXPLANATION
	DESCRIPTION OF EXPERIENCE REQUIRED	DESCRIPTION OF QUALIFICATIONS REQUIRED	EDUCATIONAL REQUIREMENTS	MANAGERIAL REQUIREMENTS	PROFESSIONALISM	NETWORK ASSOCIATIONS	
CODES							
SPECIFIC EDUCATIONAL REQUIREMENTS		87	214		41		Evidence of educational elements to role (mentions, for example, of 'leading learning')
FOCUS ON STUDENTS			87		132		Evidence of the role relating directly to students
FOCUS ON STAFF (T&L, WELL BEING)			43		88		Evidence of a focus on staff in regard to teaching, learning or well-being
GENERAL EDUCATIONAL LEADERSHIP REQUIREMENTS			158		35		Reference to non-specific management tasks such as organizing, developing, implementing etc
BUSINESS-COMMERCIAL SKILLS				44			Evidence of specific skills associated with business or commerce (sales, economics etc)
FINANCIAL SKILLS/KNOWLEDGE	36			22			Evidence of specific requirement for financial skills
MARKETING SKILLS/KNOWLEDGE	46			18			Evidence of a requirement to manage and engage with marketing processes
USE OF DATA	29			18			Evidence of the use of data (in relation to managerial practices)
ACCOUNTABILITY (APPRAISAL)	16			8			Evidence of requirement to be held or to hold staff to account
SPECIFIC EDUCATIONAL EXPERIENCE	152						Evidence of the requirement for applicants to have prior educational experience
SPECIFIC MANAGERIAL/COMMERCIAL EXPERIENCE	36						Evidence of the requirement for applicants to have prior educational experience
EDUCATIONAL QUALIFICATIONS		43					Evidence of the requirement for applicants to have specific educational qualifications
MANAGEMENT QUALIFICATIONS		8					Evidence of the requirement for applicants to have prior management qualifications
GENERAL EVIDENCE OF MANAGERIALISM				124			Any further evidence of managerial language
REQUIREMENT TO BELONG TO AN ASSOCIATION						0 (86)	Requirement for candidate to belong to a particular international school association (no direct requirement; but Associations mentioned 86 times)
MANAGER-PROFESSIONALISM					73		Evidence of documentation reflecting managerially-inclined professionalism ('strategic vision', for example)
MANAGERIAL JOB TITLES					43		Evidence of managerial job titles (Director/CEO etc)
MANAGERIAL INFLUENCE ON APPRAISAL					61		Adoption of managerial language in relation to appraisal ('professional growth', for example)

APPENDIX VII

COPY OF CODING TABLE/STRUCTURE FOR INTERVIEW ANALYSIS

APPENDIX VIIa: CODING STRUCTURE FOR INTERVIEWS WITH HEADS

'In vivo' Examples	Examples of First-Order Codes	Theoretical Categories	Aggregate theoretical dimensions
<p>"That is not who I am" (IC24); "It's just a job title, I didn't choose it. It makes no difference to what I do – I am a Principal" (IC10); 'I would walk if any sense of commercialism came before education" (IC20)</p>	Educational	Discourses drawn on in identity work	Identity
<p>"...in my eyes I have to alert teachers that these are <i>clients</i> (IC1); "I understand the real world, because in a real corporate world if you are part of a team that fails or screws up a project, you are fired. For some reason, teachers don't get that. (IC23)</p>	Managerial (Philosophy)		
<p>"I do get a buzz from trying to create more surplus for the school, that's why I am also CEO of our training division. That business side of things give me a kick" (IC3); "...I think the corporate model is the better one for the future. It is the better-informed, it's the better-connected, and there is more management expertise out there to access." (IC4);</p>	Management (Practice)		
<p>"...it goes right down to the child; that's got to be the core of everything we do...it's not tins of beans, it's children" (IC11); "You have to say: "I am accountable, I'm responsible for your child"; if you've never done that, if you don't know what it <i>means</i> to put the student first you've got no business being a Head" (IC11) "[The Head will] provide professional instructional leadership and modeling...that establishes the school as a center of educational excellence" (RC50)</p>	Reference to professionalism	Evidence of managerialism 'out there'	Professionalism
<p>"Yea, we started that [distributed leadership] a few years back...it was one of those things, you know, something all schools seem to have a go at" (IC11); "Distributed leadership has become something that most schools do. I remember it starting back in the early 2000's, probably some conference somewhere." (IC4) "Fancy job titles certainly seem to be creeping in. The cynical view would say that the roles are exactly the same, but the fancy title gives the Head, whatever he [sic] gets called, more status" (AD); "...my KPI's are the same as pretty much <i>all</i> Heads, roll growth is one of my targets" (IC5); "You have to fit in, you have to walk the walk and talk the talk. (IC12)</p>	References network influences		
<p>"You can't employ a Head who hasn't got any business knowledge. That would be commercial suicide, clearly." (IC24); "I'd like to think of myself being an eight, but the reality of what I do on a day-to-day basis, and the reality of how I impact the school, is probably a six." (IC11); "It has to be a balance between our educational strength, our commercial sense and our vision" (IC21)</p>	Manager identity	Evidence of hybrid identifications	Hybridity
	Educational identity		

APPENDIX VII: CODING TABLE FOR INTERVIEWS WITH HEADS

CATEGORIES	WHAT DISCOURSES DO THE HEADS DRAW ON IN THEIR IDENTITY WORK?			EVIDENCE OF EXTERNALLY IMPOSED MANAGERIAL REQUIREMENTS		DOES THE TEXT EVIDENCE HYBRIDITY?		EXPLANATION
	EDUCATIONAL	MANAGERIAL (PHILOSOPHY)	MANAGEMENT (PRACTICE)	REFERENCE TO PROFESSIONALISM	REFERENCE TO NETWORK INFLUENCES	MANAGER IDENTITY	EDUCATIONAL IDENTITY	
	DO THE TEXTS EVIDENCE HYBRIDITY?							
WHEN DESCRIBING THE PURPOSE OF SCHOOL OWNERSHIP	17	45	9					Heads description of owners purpose (profit, legacy etc); a potential indicator of managerial thinking/pressure
WHEN DESCRIBING BOARD STRUCTURE/GOVERNANCE	20	37	12					Heads description of Board and Governance arrangements; a potential indicator of managerial thinking/pressure
WHEN DESCRIBING THE IMPLICATIONS OF CORPORATE OWNERSHIP	56	106	87					Heads description of implications of corporate ownership; a potential indicator of managerial thinking/pressure
WHEN DESCRIBING THE OWNERS VIEW OF HEADSHIP	2	12	78					Heads description of how school owners/Board view the role of Head (educational or business)
WHEN DESCRIBING TENSIONS BETWEEN HEAD & BOARD/OWNERS	45	48	21					Heads descriptions of any tensions between themselves and owners/Board (potentially indicating tensions between educational and commercial priorities)
WHEN DESCRIBING FOR-PROFIT PRESSURES	27	69	6					
EVIDENCE OF BUSINESS-THINKING			97			76		Unsolicited evidence of the Head demonstrating business-like thinking
WHEN DESCRIBING LINKS A SCHOOL BUSINESS MANAGER	4	15	-			8	34	Reference to Business Manager post (with regard to business-related tasks and Heads responsibilities/identity)
WHEN DESCRIBING THEIR IDENTITY	356	181				97	181	Descriptions of Self and role as educational
MANAGERIAL CHANGES TO ROLE/MANAGERIAL EXAMPLES	19		55			36	15	Descriptions of managerial changes to role
EVIDENCE OF PLURALITY		34				8	34	Description of role/identity including dual element of education and business
EVIDENCE OF FINANCIAL PRESSURE	-	6	24			14	37	Evidence of Heads facing financial pressure
EVIDENCE OF STAFF/HR ISSUES	32	21	17			2	17	Evidence of Heads facing Human Resource pressures
REFERENCE TO QUALIFICATIONS	59	12	23			8	23	Heads responses to questions related to desirable qualifications
REFERENCE TO EFFICIENCY	4		9			5		Unsolicited references to efficiency that evidence managerial thinking/language
(UNSOLICITED) REFERENCES TO OTHER SCHOOLS					69			References to other schools; perhaps to illustrate a point or to draw comparison
(UNSOLICITED) REFERENCES TO COLLEAGUES IN OTHER SCHOOLS					23			References to colleagues (Heads) in other schools; perhaps to illustrate a point or to draw comparison
(UNSOLICITED) REFERENCES TO OTHER NETWORK AGENTS					14			References to network agents such as recruitment consultants; perhaps to illustrate a point or to draw comparison
(UNSOLICITED) REFERENCES TO NETWORK ASSOCIATIONS					31			References to network associations and any resulting pressure for change
(INDIRECT) REFERENCE TO PROFESSIONAL CONSCIENCE				33				Evidence of Heads describing behaviour (knowingly or unknowingly) suggestive of professional discourses
REFERENCE TO PROFESSIONAL COGNITIONS				47				Evidence of Heads describing (knowingly or unknowingly) potential network cognitions
EVIDENCE OF PERCEIVED PROFESSIONAL NORMS				36				Evidence of Heads describing (knowingly or unknowingly) specific professional network practices
WHEN DESCRIBING COMPETITIVENESS						47		Reference to competitive nature of the schools' market and/or the market in general
WHEN DESCRIBING THE MARKET/ECONOMICS						6		Reference to market or economic factors

APPENDIX VIII

EXEMPLAR OF RECRUITMENT DOCUMENTATION (ANONYMISED)

APPENDIX VIII – EXEMPLAR RECRUITMENT DOCUMENTATION (ANONYMISED)



APPOINTMENT OF THE HEAD OF SENIOR SCHOOL

DECEMBER 2013







INTRODUCTION TO

is a vibrant co-educational school for 2,700 students aged 3-18. The School offers the best of British-based learning in an international context, catering for expatriates in from a wide range of backgrounds and cultures. The School provides an exceptional educational experience, nurturing children to be happy and successful in their lives and to be leaders of life in general. They develop high expectations of themselves in the academic, the aesthetic, the physical, the musical and the artistic spheres of learning.

students enjoy being at school; they look forward to the challenges, the opportunities, the comradeship, the satisfaction and fun that is part of daily life here. They are intentionally nurtured in this environment to become balanced, confident and articulate world citizens who have a view of what the world should look like and a deep desire to contribute to making it so. Despite having a large proportion of British passport holders in the student cohort, the cultural roots and experience of many are more international with a notable number having English as their second or third language.

The Senior, Junior and infant schools have been judged to be 'Outstanding' in recent Ofsted/BSO Inspections.



3




MISSION STATEMENT

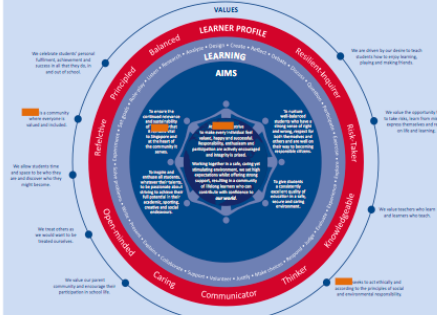
has a long tradition of providing British-based learning with an international perspective. Working together in a safe, caring yet stimulating environment, we set high expectations whilst offering strong support, resulting in a community of lifelong learners who can contribute with confidence to our world. Responsibility, enthusiasm and participation are actively encouraged and integrity is prized.



4



LEARNER CIRCLES



5



STRATEGIC HEADLINES

To develop Information Literacy for a Technological World.

To nurture mindfulness and to enhance the well-being of our community.

To build on Tanglin's heritage in Singapore and to enhance its reputation as a world-class school.

To nurture a vibrant community of happy, confident lifelong learners of all ages who are mindful of our world, their role in it and have a deep desire to protect it and care for it.

To maintain and develop the high standards of achievement through a commitment to personal development and a broad, balanced and challenging curriculum, underpinned by the Learner Profile.

To ensure that the School attracts, retains and develops appropriately skilled and high quality teaching and support staff.

To improve both collaboration and communication with the wider community.

To provide high quality, sustainable resources through effective and responsible governance, leadership and management for the ongoing and future needs of the School.

6



LEADERSHIP, MANAGEMENT AND GOVERNANCE

Leadership and management

is organised into three schools:

- Senior School (11-18 years)
- Junior School (7-11 years)
- Infant School (3-7 years)



The Head of each school reports directly to the Chief Executive Officer (CEO), Peter Derby-Crook. The CEO leads the School Management Team which is composed of the following individuals:

- Head of Senior School
- Head of Junior School
- Head of Infant School
- Director of Learning
- Chief Operating Officer/ Chief Financial Officer
- Director of Human Resources
- Director of Operations/Project Director
- Director of Development

7

Governance

is a non-profit company limited by guarantee and is registered in Singapore as an educational charity. It is entirely dependent on school-fee income with all the revenue being devoted to the provision of education.

The School is administered by a self-appointed Board of Governors who meet (with the CEO in attendance), as a full Board at least once each term. The Board has subcommittees for Education, Finance, Staffing, Development and Buildings. Heads and other members of the Management Team (MT) attend these meetings and the final full Board meeting of the year. In addition, two governors meet on a regular basis with each Head to review and advise on key school developments.

The Board delegates through the CEO to the responsibility for the leadership, management and operation of the School. Each Head of School has full responsibility for running their school as a Head would have in any other circumstance. In practice, the CEO is a conduit between the Board and the Schools, and provides line management, support and guidance. This has proved to date to be a very effective structure of governance and management.



Governance, Leadership and Management

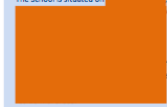


8

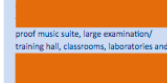


FACILITIES

offers quality learning and sporting facilities in an environment that is highly conducive to student development. The School is situated on



The School comprises separate modern buildings for Infant, Junior, Senior School and Sixth Form students. A new five story




proof music suite, large examination/training hall, classrooms, laboratories and a

A six-storey Sports and Performing Arts Complex was completed at the end of 2007 and a new Central Administration Building was finished in April 2007.

In addition to architect-designed classrooms set around bright and colourful common areas that promote a sense of community, these buildings also feature large multi-purpose assembly and sporting halls, music rooms, indoor facilities for orchestras and choirs, suites for the study of Information and Communications Technology, drama studios, science laboratories, libraries, health centres staffed by professional nurses and food service areas.

has four well-resourced libraries on campus, one library for each of the Infant, Junior and Senior Schools and a professional development library for staff. Other facilities at the School include an eight-lane 25 metre swimming pool, a learner pool, large outdoor playgrounds, tennis courts, playing fields, a fitness centre, an outdoor chess corner and shaded lunch areas.

9



ROLE DESCRIPTION

The Head of Senior School has ultimate responsibility for the strategic leadership and operational management of the School and has full authority for leadership, curriculum and resources. The Head of Senior School is accountable to the Chief Executive Officer and the Board of Governors for delivering the highest standards of education and pastoral care.

The Head of Senior School is also a member of the whole school leadership and management teams, and will be expected to work closely with the Chief Executive and Board of Governors to contribute towards the overall strategic development of the school.




13



THE POSITION

The appointee will hold qualifications and experience appropriate for this exciting and challenging position

The Head of Senior School is a key member of the School community

The Head of Senior School works closely with the CEO (who has responsibility for the whole school), and with the Board of Governors

The Head of Senior School also sits on the Leadership and Management Teams of the whole school

14



JOB DESCRIPTION

To nurture a vibrant, collaborative learning culture within a caring community

To model good leadership, attitudes and behaviours that support the School's mission

To create a school ethos where participation and achievement are the norm

To ensure that the best possible people are engaged and retained

To develop effective leadership and management roles, responsibilities and behaviours

15



PERSONAL PROFILE

Beliefs & Values		Qualities	
Self belief <ul style="list-style-type: none"> • At ease with oneself • Confident (and arrogant) • Courageous • Resilient • Resiliently optimistic 	Integrity <ul style="list-style-type: none"> • Has a moral compass • Honourable • Has righteous indignation • Has clear values • Holds the trust and respect of others • Is authentic 	Charisma <ul style="list-style-type: none"> • Has presence • Has warmth • Leads by example • Has charisma 	Humility <ul style="list-style-type: none"> • Open minded • Modest • Approachable • Emotional intelligence • Has empathy
Drive <ul style="list-style-type: none"> • A hard worker • Determined • Needs inspiration • Has sufficient ambition • Hardworks person 	Child-centred <ul style="list-style-type: none"> • Believes in profound learning • Cares deeply • Loves being with children • Has an unconditional positive regard for all 	Demeanour <ul style="list-style-type: none"> • Is positive • Is enthusiastic • Has a sense of humour • Is engaging • Has style • Is an ambassador 	Influential <ul style="list-style-type: none"> • A self-motivating leader • Is a role model • Has clear expectations • Command respect • Is a excellent role model
Actions		Skills & Abilities	
As a performance manager <ul style="list-style-type: none"> • Motivates the people of the OIG • Values due process • Has humility • Has courage (and hope) 	As a decision maker <ul style="list-style-type: none"> • Is decisive • Is rational • Is a clear thinker • Is a thoughtful adventurer 	Communicating <ul style="list-style-type: none"> • A clear speaker and writer • Is a listener • Has common sense • Reads regularly • Public speaker • Is a team player 	Intelligence <ul style="list-style-type: none"> • Wise and knowledgeable • Has good judgement and reasoning • Has insight • Is a good presenter
Behaviour <ul style="list-style-type: none"> • Gets involved • Shows interest in others • Likes to learn openly • Is a learner right around the world 	As a delegator <ul style="list-style-type: none"> • Trusts and delegates with respect • Empowers and motivates • Delegates specific and accepts responsibility • Efficient time manager • Knows when to get out the way 	Visioning <ul style="list-style-type: none"> • Sees the big picture • Is a strategic thinker • Is a long thinker and creative • Has conviction • Is a positive thinker 	Efficient working <ul style="list-style-type: none"> • Gets things done • Is reliable • Is a competent professional • Manages the workload • Has a work/life balance

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APPENDIX IX

INTERVIEW TRANSCRIPT

INTERVIEWEE C19

LOCATION: Head's Office at School

DURATION: One Hour

PROFILE: Late-forties British male (BA, PGCE). First overseas posting. UK independent school background. Mid-sized, for-profit franchised British school (CIS, FOBISIA).

This transcript was selected on the basis that Interview C19 features heavily in the analysis and, being a relatively short interview, the transcript offers a more efficient view of the key themes. Additionally, the relatively short interview length made removing references to school and/or persons to ensure anonymity easier.

[General preamble and greetings, interviewee compliments school campus; recorder is moved and picks up during confidentiality conversation]

Interviewer: I completely understand it particularly because us we are not direct competitors obviously at the moment. I work for a competitor, so yeah. If there's anything that touches on commercially sensitive, corporate sensitive ground then that's not a problem at all.

Interviewee: And so what about the confidentiality of this interview then Denry?

Interviewer: Your name will not be identified in there, it will just be 'A' head at 'A' school and I'm not actually looking for individual school context. I'm looking for themes and strengths across. What I will do is before it goes to the university I'll send you the abstract and anything that relates in terms of data analysis just for your approval. But certainly, it's not about you *per se*, it's not [School Name] *per se*, it's about the bigger picture. My intention is to join the dots between all of these interviews and paint that bigger picture.

Interviewee: Okay, no problem.

Interviewer: So, in broad terms I am looking at the implications of business thinking in schools for Heads.

Interviewee: Okay. Fire away.

Interviewer: So the first question, it's just for context and this is mainly so I can square off the research, is your background.

Interviewee: I will just talk you through that then. So I'm [age] years old, I left [name] University in 1988 and went to [School Name] School in the UK as a teacher of English and progressed at [school name] to assistant House Master, House Master and Deputy Head. Then in 2004/5 came up to [country] for the first time and then took over as the second head of this school in 2005.

In terms of your piece, obviously personalities aside, what the governors wanted to do after the foundation phase that work through the system, what the governors were trying to do is to establish a direct link rather than just a franchise operation between [School Name] in the UK and this school I think.

Interviewer: That's interesting because that links to the next question. The next question was just describing the governance arrangements and your role within that governance.

Interviewee: I'm not a governor but I sit on the board of governors. And what we do with the governance is pay due service to the legislative framework in which we work here in [Country] obviously. But then we have a board model that is equated to the UK.

So we have a Chair and then we have one independent UK governor, and then we have three UK governors who are directly attached to [School Name] School governing body. So the chairman of governors then two others who also serve. Then we have a balance of international business people on the board and they are lined up primarily to my needs. Say for example; we have accountancy professionals, we have a legal of professionals, we have marketing professionals and corporates and business professionals there and the same from the Thai community as well. So that's how the governance works.

And again in terms of your interest I would say that the direct and permanent commitment of the UK governors is really critical to all of this. So they all come out regardless of the jobs that they are doing, obviously very high powered positions, very demanding position in terms of time in the UK, they all come out to the board meetings and that really does give a sense of reassurance to the business model.

Interviewer: What about the relationship between the governors and the school owners?

Interviewee: Very important. So the school owner sits on the Board. He's not the Chairman, he's just as a member of the Board. And I think the reality of this is that a lot of the operational work happens at what we call our ex-co level, executive committee level. So every third week a small executive team of Governors and school leaders meet and work across the boundary of the governance and school operation and then we feed proposals from that into the board where the ultimate decisions are made. If that's all above-the-line. Below-the-line, what I would say about this is that a model which combines a proprietorial context and all that comes with that in terms of investment and support and then the culture of investment that comes from people who have worked in UK schools is the best way of getting the balance right around that board table.

So for example, the Executive Committee will present to the board a capex program, and we run a three year capital development program which rolls, so in other words we're always looking three years on in terms of capex. The ultimate decision to sanction the funds is the governing body's but the conversation between what shall we do, where are our priorities, is critically important here. So this is for example we will be working with the proprietor who'll be investing the funds, the UK governors would be saying, "This is where we need to be to be at the top of the market here in [City] and in South East Asia." So that's the reality of how it works.

Interviewer: If I ask the board and the owner to describe your role as head, how do you think they would describe the role?

Interviewee: Well obviously I'm Principal in the school with -- effectively they would probably say, I'm like a CEO with two COOs operating here. So vice principal head of junior, vice principal head of senior, who you're going to meet a bit later, Darren, they would be the chief operating officers of the senior school and the junior school, and I would be the CEO of the organization, working with director of business services who would be the CFO. So actually it's quite a straightforward corporate model. They would regard me as the executive leader of the school, and they would expect me to be thoroughly professional in terms of making sure that all the key financial decisions were routed through the executive committee and then the board. But we agree the key financials, we agree the budget and then we keep track of that through the ex-co committee, but then they stand back and let me run the school.

Interviewer: With that, the language of commerce you describe your role then in very corporate terms, is that deliberate, is that deliberate from the Board, from

yourself and is that something that percolates through the organization? Is that set kind of above-the-line and then beneath you is educational?

Interviewee: Those comments really were to help you understand -- you asked me what the Board would say, that's how they would say it. That's not language I would ever use in the context of the school. We use school terminology; principal, vice principal, head of junior, head of senior and then assistant principals working closely with them. That said, I would see my role as helping teachers to understand in all of the best ways that this is a business.

So for example we have many teachers who are from the maintain sector and this direct link between the quality of their performance and the salaries they receive needs to be affirmed in their thinking. So actually it's possibly a reduction program. I would never speak to the staff about being a business, but I do remind them of our external responsibilities. Word of mouth is by far the best of marketing we have. I remind staff about appearance, about presentation, and about the quality of their marking - this stuff matters, especially to parents. I have to explain to the teachers that it is the *clients* who are paying your wages, and they will look at the quality of your marking, how you dress...this stuff matters, some don't get it

So actually I do talk to them about the way in which they mark, the way in which they assess, the quality of their presentation at parent-teacher conferences, how they are in and around the school. I would say my role is to focus on the educational well-being of the young people in our care but the business context provides a really excellent discipline. It's enjoyed by, if you like, all the stakeholders in the school.

Interviewer: Then clearly, philosophically, you don't have issue with the for-profit moniker...

Interviewee: No, none whatsoever.

...there are others who have I would say - well sometimes there is a disconnect between international education and independent education...the teachers we recruit often bring a maintained sector view...

Interviewer: I understand, we have experienced similar things. What are the differences though? Do you mention the for-profit status to staff? How do the staff react if you use 'corporate' language?

Interviewee: All I would say about that is I would be very careful. I'm much more likely to use that language one-to-one across the sofa as we're talking now than in a public environment. However, in my training opportunities and when I speak to junior staff, senior staff, induct new staff, I'm thinking practically every one of the feedback sessions from my class observations this would be referred to.

Interviewer: Why do you think you are more comfortable with that language than staff?

Interviewee: I've worked in a for profit school all my life. [School Name] School in the UK obviously reports to the charities commission and is a charity and does not make any profit, it makes a surplus which they then re-invest back into the school. It's no different. And here the re-investment into the school is identical to what happens in [School Name] in the UK.

I would say though that I am very careful. I'm much more likely to use it one to one across the sofa as we're talking now than in a public environment. However, in my training opportunities and when I speak to junior staff, senior staff, induct new staff, I'm thinking practically every one of the feedback sessions from my class observations this would be referred to.

Say for example, in a couple of hours time I would be feeding back to the partner I was talking to you about whose [unclear 00:12:36] of yesterday and I want to talk to him about marking, and I'm going to talk to him about the marking strategy

and what those books should look like, and then, and why? Because the clients who are paying your wages will look at the quality of your marking, whether there is positive support, whether there is clear direction forward, whether there is a quality about what you have done, and that is reflecting on you. So that's more the way which I will talk about that client relationship. But again, I have no problem with that.

Interviewer: So in essence framed within the educational needs and...

Interviewee: Yes, correct.

Interviewer: The educational need is what's driving what the customer is buying.

Interviewee: Yeah, right, correct.

Interviewer: A similar strand of thought; how would you describe the broader objectives of the school and how would the owner, governors describe those objectives?

Interviewee: I think they would absolutely aligned. What we did, and again this is a bit familiar to you. While we were doing our market research and due diligence, we continue to do it in other areas as you have done too. We wanted a sense of clarity about the sort of school that we are, and this is not the right school for everybody. We're very happy with that, it is a selective school. One of our key organizational values is selectivity, it is academic. We have areas of extracurricular strength which support that key goal. The pastoral side of school life which is built upon a boarding school model, obviously we are day here, it's designed to support those goals.

So my response would be narrower than some Heads, but I mean my view, and again you would be very familiar with this is that one of the very good things about the international premiership in Bangkok is that parents come and they have a really excellent choice of schools in terms of what is right for them. You've got [School Name], you've got [School Name], you've got [School Name], you've got [School Name] and you've got [School Name], all excellent schools, all with very different offerings and we don't profess to be all things to all men.

Interviewer: Again this is an aside; I think one of the best things that you ever did when you very first came is exactly what you've just described and kind of nail [School Name] School colours to the mast and that really supports [School Name] on the map and the direction of travel that it is on now. Because obviously when you arrived your numbers were smaller than [Competitor School], it was probably in the 800s, maybe 900s when you arrived but quickly to what have you on now, 1,500 something?

Interviewee: We're right at the top of 1,500 and that's it really.

Interviewer: A large part of that was from identifying where [School Name] fitted within that market and actually having the conviction to stick to that and say, this is who we are, not everybody gets that right. How often does [owner] visit?

Interviewee: So certainly every third week. So tomorrow is ex-co, so he will visit the school to chair the executive committee every third week. We would talk on the phone 12-15 times a week, and outside of these ex-co meetings, he would either meet with me here on school or elsewhere on four or five occasions.

Interviewer: When he visits outside of the formal meetings, what does he visit to do?

Interviewee: Good question, it can be a range of things. Obviously those three weekly ex-co meetings and the termly governors' meetings don't provide the timeframe for every decision. So for example particularly in the recruitment season sometimes we just have to touch base on our recruitment strategy and how we're going to do that. We will often need to discuss capital plans, so for example there's the new music school going in up there. So then he would come and see how the capital projects are going. Obviously like you as well we are keenly interested in

what the next step for [School Name] is. So he would involve me in those discussions and a small team of UK and Bangkok governors in our opportunities elsewhere as well in the region.

Interviewer: So he's interested in the operational. He would come look at that schedule, look at things...

Interviewee: Operational, probably not. I would not say operational, I would say the capital development project, yes. He would never for example come in and expect to have a view on the running of the junior school, the running of the senior school. Obviously there is an inter-relation between capital development, the salary structure for the year ahead, additional head count, all of those things come under the executive committee [unclear 0:18:02].

Interviewer: That's what I was going to say, you mentioned recruitment so that he would be recruitment strategy, but that would be from a salary, that would be from a Head count point of view rather than a CV point of view because he's not interest in the CVs.

Interviewee: No, and basically what we would do obviously we are very familiar with the strength of our balance sheet, we know exactly where we want to be pitching our wage bill. We look carefully at tuition fee increases, and how to apply them against what we offer parents. We know what we need to deliver, we have done our research, we know what the market wants. All of those would be executive committee workings through to a proposal to the Board and then if there is any stretch to be applied to those proposals, that's when I pick up the phone to Charlie and say, "Look, I think we just need to this or step back from this one this year and do that," then I'll just keep him consulted in that way.

Interviewer: We've touched on the for profit label already, has that affected staff, students, parents? Any examples of any negative reaction or positive reaction to the for profit label?

Interviewee: No, I think it's clearly understood. I think as long as the school continues to invest and continues to provide the best possible package for staff, and the best working environment for staff, then the understanding that is a for profit organization is accepted. Negative sides to it, no, I don't think so but I think it's just understood. And as long as we deliver on what we promised to do I think that's understood.

Interviewer: I wonder if that's about -- because clearly it's different here in other context. We both know of schools further down, outside of the premiership where it is more of an issue. Even at [competitor name] there are staff who would take a very strong political position on the for-profit label and question where that profit goes and why we are even for-profit. Why should the owner be allowed to take money out of an educational institution? That begs the question, why you work for a for-profit school?

Interviewee: Correct. That's also I would say to -- if anybody ever mentioned that to me I would say, "I totally respect your position, this is clearly not the right school for you to be working in". And I don't think you could have that sort of descent. There are lots and lots of international schools working with boards of trustees, many within the premiership in [city] and certainly in the region who follow a different model. And if that's just the way you feel, and if that's just the way in which your politics reveal themselves, I think we should agree to differ and that you should move on.

Interviewer: I think the tensions probably comes say in the mid-tier schools where the owners are more on the corporate side and less interested in the educational side...

Interviewee: At the expense of education, yeah, sadly. Well there's no sense of that in there. If you look at the investment in the school, what we do both in terms of the package

for teachers and the working environments in which they operate, those are critical things, their living standards and all of that.

Interviewer: Again slightly off script, and to say I've turned attention to this would be quite accurate, but our approach to take on headships of some of those even upper mid-tier schools, but I've stayed well away because you just talk to the owners or the current Heads and you don't get that sense that the owner would be like [owner], has re-invested and interested in the educational business of the school beyond the commercial business of the school. And you could go in with all the energy in the world and all the ideas in the world, all the innovations but after six months you just become completely disenfranchised because you'll be gaining very little traction.

Interviewee: I understand that and I would say that's probably where the UK governors and the name and reputation of the UK brand is very important because obviously a satisfied staff is at the heart of that. I'm familiar very with the school, but that's not been the case.

Interviewer: This will be unbranded.

Interviewee: Sometimes even branded...

Interviewer: Any named schools, but yes for the branded is -- absolutely. Broadening this out there, and again if any of this is commercially sensitive then just say -- [School Name] was once upon a time talking about Shanghai. All that still expansion plans for...?

Interviewee: We continue to look, obviously I wouldn't say where, but we continue to look. I would say that on the one hand you could say that our progress is slow, on the other hand I would say that we are very discerning about what we want to do. In a nutshell, we are looking for the next opportunity as a school which can genuinely and beneficially impact on the students here in [city] and the students in UK. So how can this school bring the family of schools together and how does its placements and opportunities that it provides actually deliver benefits for [city] and UK [unclear 0:23:34]?

So there are if you like - again [competitor name] experience is well in advance of us on this, but there are flagship opportunities, there are key cities in the region where you can have a flagship. But would it deliver meaningful benefits? Probably not. So of course the balance between our commercial sense, our educational strength and our vision as an organization needs to come together in the next project. So I don't think we're that interested in a flagship operation.

Interviewer: Do you, and in a sense you've described it, do you think if there was an additional school, clearly some schools pursue growth, they pursue branch schools and lots of Nordanglia and the Dulwich Group that they're opening new schools primarily for profit. They haven't got those highest standards, what's right for [School Name]. So do you think if another [School Name] was opened elsewhere, it would impact on you and your role?

Interviewee: We wouldn't open if there was going to be any negative impact and I wouldn't be interested if it did. We are looking to an opportunity that will actually make a difference to the young people who are in the school. So that's where that word discerning comes in. I don't mean to be sort of high flown in that, what I'm saying is that we clearly want a school that will tap into our dual expertise of historic boarding in the UK, academic selective; music, drama, education here in [country]. We've got to get that right, that's where my expertise lies, and then actually provide meaningful educational benefits not just financial ones.

Interviewer: In contrast to the likes of [competitor name] who are going for first mover advantage...

Interviewee: That's correct, yeah.

Interviewer: Get in there, build the brand, get your 1500 kids and it's not actually quite second mover advantage but the get it right model rather than be there first model.

Interviewee: Correct. And of course we haven't got the range and scope of [competitor name] but their thinking is very different and to be commended in many ways but ours is a different piece of thinking to that. We don't envisage 12, 15 schools and a corporate structure which runs flagship operations, loss leader operations, profit centers which is more like the [competitor name] model. We don't envisage that, we see a smaller number of schools, a slower growth, meaningful benefits built on our current understanding and expertise.

Interviewer: To the extent for [competitor name] that they will be doing IPO well [unclear 00:26:24] a completely different model..

Interviewee: Yeah.

Interviewer: The next question kind of moves on from that. What do you see as being the future for profit schooling and for the Heads who work in them?

Interviewee: Well I would say I think it's really the marketplace if the numbers extrapolates as we think they will I think is really the marketplace for several different models. If you regionalize it, I think [city] is very interesting. If you just to look at those premiership schools that we have looked at. And if other well cities in South East Asia can create that diversity of opportunity for parents, I would say that is something that should be striven for by the governments.

So take [school name] for example, the Malaysian relaxing of the admissions restrictions will have a significant impact. And they can stop to move towards more like a [city] model. But ultimately if you think of your KPIs in the organization and for us of course college placement is critically important, well that's a driving force. But then that's where the business model and the educational model simply have to come together.

So for example we would say that actually from this school getting students to the university straightforward as an educationalist yourself we've got everything in place here, wonderful school, great teachers, aspirational parents, firm established cornerstone upon which the school is built, clear expertise in key areas. But having them thrive at university is a very different beast all together. So that's how we design our strategies and programs within the school.

Changing for Heads. Well, I need to be very familiar with the strength of our profit and loss account. I need to know exactly where we want to be pitching on salaries. I have to look carefully at tuition fees. This is a key part of the job.

Interviewer: Does that change come easily?

Interviewee: Well, I walk the walk, but there are different walks you know. I talk to my teachers differently than I talk to my Board, and differently than I talk to the owner. We are pretty lucky here, [owner name] is very supportive, very understanding of education and educationalists. But, yea, sometimes When you are feeling pressured because the owner is not getting the cashflow they want, I often think, "Really? Is this what I am are in it for?" (Interviewee C19)

Interviewer: How do you respond when faced with situations or decisions like that?

Interviewer: I think it accumulates, each decision adds up, each time is a little chip away at your soul – to the point where you think 'I can't do this anymore'. I think you make your stand on certain points because I wouldn't be true to myself if I didn't, but you can't block everything...sometimes you just have to go with it... take another chip and live to fight another day.

Interviewer: OK, I can see we are tight for time. Last question. On a scale of 1-10, 10 being an educationalist, chalk dust under the fingers, 1 being a business person, head in spreadsheets and metrics, where would you place yourself?

Interviewee: Well, I started as a 10 for sure. In my heart still somewhere between 7-10 but like I say I have always worked in for-profit schools so I know the other side and am comfortable there so long as I don't think education if being compromised. It when I feel myself having to do the stuff that a 1 or 2 would do that its drags, the 7-10 stuff is what I enjoy the most – that's gotta be what its about, right?

Interviewer: Yes, I would agree. Is there anything else you haven't mentioned that you would like to?

Interviewee: No, that's all. I think my secretary just brought the next meeting through.

Interviewer: Ok, thank you for your time. Much appreciated and really useful, some very valuable insights there. As I say, everything is confidential, your name and the school's name won't be mentioned in the thesis. I just need your signature now to confirm use of any quotes from the transcript, anonymised of course... 'Head A' or some such.

Interviewee: Great, thank you very much indeed.

Interviewer: Really good stuff.

[Chatter as interviewee turns off recorder]

APPENDIX X

COPY OF KEELE UNIVERSITY ETHICS COMMITTEE APPROVAL

Ref: ERP1205

25th September 2014

Denry Machin
84 Congleton Road
Church Lawton

Dear Denry,

Re: The corporatisation of international schools

Thank you for submitting your application for review. I am pleased to inform you that your application has been approved by the Ethics Review Panel. The following documents have been reviewed and approved by the panel as follows:

Document	Version	Date
Summary of Proposal	5.0	18/08/14
Letters of Invitation	1.2	18/08/14
Information Sheets	1.2	18/08/14
Consent Forms	1.2	18/08/14
Consent Form for the use of quotes	1.2	18/08/14

If the fieldwork goes beyond the date stated in your application, you must notify the Ethical Review Panel via the ERP administrator at uso.erps@keele.ac.uk stating ERP1 in the subject line of the e-mail.

If there are any other amendments to your study you must submit an 'application to amend study' form to the ERP administrator stating ERP1 in the subject line of the e-mail. This form is available via <http://www.keele.ac.uk/researchsupport/researchethics/>

If you have any queries, please do not hesitate to contact me via the ERP administrator on uso.erps@keele.ac.uk stating ERP1 in the subject line of the e-mail.

Yours sincerely



PP

Dr Jackie Waterfield
Chair – Ethical Review Panel

CC RI Manager
Supervisor

APPENDIX XI

DATA FOR CALCULATION OF MARKET STRUCTURE

(FOUR-FIRM CONCENTRATION RATIO)

APPENDIX XI: HOW COMPETITIVE ARE INTERNATIONAL SCHOOL MARKETS?

MALAYSIA

ROLL OF FOUR LARGEST SCHOOLS IN CITY/COUNTRY	CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
	SCHOOL 1	2,218	31,554	25%
	SCHOOL 2	2,400		
	SCHOOL 3	1,600		
	SCHOOL 4	1,580		

SINGAPORE

ROLL OF FOUR LARGEST SCHOOLS IN CITY/COUNTRY	CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
	SCHOOL 1	3,011	59,677	21%
	SCHOOL 2	2,600		
	SCHOOL 3	2,779		
	SCHOOL 4	3,946		

THAILAND/BANGKOK

ROLL OF FOUR LARGEST SCHOOLS IN CITY/COUNTRY	CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
	SCHOOL 1	1,575	42,391	17%
	SCHOOL 2	2,246		
	SCHOOL 3	1,896		
	SCHOOL 4	1,604		

VIETNAM/HCMC

ROLL OF FOUR LARGEST SCHOOLS IN CITY/COUNTRY	CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
	SCHOOL 1	1,850	25,292	19%
	SCHOOL 2	1,050		
	SCHOOL 3	880		
	SCHOOL 4	989		

TAIWAN/TAIPEI

ROLL OF FOUR LARGEST SCHOOLS IN CITY/COUNTRY	CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
	SCHOOL 1	2,313	5,410	88%
	SCHOOL 2	1,485		
	SCHOOL 3	604		
	SCHOOL 4	352		

CHINA/SHANGHAI

ROLL OF FOUR LARGEST SCHOOLS IN CITY/COUNTRY	CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
	SCHOOL 1	1,775	68,808	9%
	SCHOOL 2	1,476		
	SCHOOL 3	1,185		
	SCHOOL 4	1,451		

CHINA/BEIJING

ROLL OF FOUR LARGEST SCHOOLS IN CITY/COUNTRY	CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
	SCHOOL 1	1,668	57,023	10%
	SCHOOL 2	1,417		
	SCHOOL 3	1,390		
	SCHOOL 4	1,100		

HONG KONG			
CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
SCHOOL 1	2,677	78,218	11%
SCHOOL 2	1,899		
SCHOOL 3	2,245		
SCHOOL 4	2,035		

JAPAN/TOKYO			
CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
SCHOOL 1	1,515	18,978	18%
SCHOOL 2	817		
SCHOOL 3	728		
SCHOOL 4	436		

DUBAI			
CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
SCHOOL 1	3,850	248,026	4%
SCHOOL 2	2,340		
SCHOOL 3	2,458		
SCHOOL 4	2,216		

PAKISTAN/KARACHI			
CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
SCHOOL 1	2,100	35,602	12%
SCHOOL 2	950		
SCHOOL 3	750		
SCHOOL 4	650		

GERMANY/BERLIN			
CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
SCHOOL 1	1,700	8,806	50%
SCHOOL 2	1,000		
SCHOOL 3	850		
SCHOOL 4	830		

UK/LONDON			
CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
SCHOOL 1	1,354	4,672	61%
SCHOOL 2	480		
SCHOOL 3	500		
SCHOOL 4	514		

INDIA/MUMBAI			
CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
SCHOOL 1	2,350	39,973	22%
SCHOOL 2	3,900		
SCHOOL 3	1,450		
SCHOOL 4	1,200		

UAE/ABU DHABI			
CITY	ROLL	TOTAL COUNTRY ROLL	FOUR-FIRM CONCENTRATION RATIO
SCHOOL 1	6,427	126,947	10%
SCHOOL 2	1,775		
SCHOOL 3	3,000		
SCHOOL 4	1,855		

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