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International Journal of Educational Development 27 (2007) 525–541

International Journal of EDUCATIONAL DEVELOPMENT

www.elsevier.com/locate/ijedudev

The role of UK qualification suppliers in Sri Lanka and Zimbabwe: A comparative evaluation

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Abstract

This paper is based on research on the role of UK qualifications suppliers in providing qualifications and accreditation in Sri Lanka and Zimbabwe in the context of rather different engagements with liberalisation, structural adjustment and globalisation. Sri Lanka's economic liberalisation and growth since the late 1970s has had a *de facto* decentralising effect on the supply of and demand for qualifications. In Zimbabwe, structural adjustment has been accompanied by a decline in economic growth and a localisation of school-level qualifications. These differences have led to different interactions between UK suppliers and domestic consumers, discussed in terms of supply and demand; localisation and globalisation; competition and educational mission. The paper concludes with the implications of these findings for future research studies on globalisation and qualifications.

Keywords: Globalisation; Qualifications; Sri Lanka; Zimbabwe

1. Introduction

In an earlier paper (Little and Evans, 2005) we argued that national policies of economic development could generate an environment conducive to foreign private trade in education and qualifications, even if national education policies legally prevented or deterred the establishment of private schools and universities. In the case of Sri Lanka we suggested that a degree of internationalisation of education is occurring despite national education policy to the contrary because economic liberalisation relaxed foreign currency restrictions and encouraged inward foreign investment. A combination of high social demand for foreign qualifications and a lack of coordination of policies between authorities responsibilities for education and economic development created a determination on the part of those who could afford them to exploit the policy disjunctions (Hettige, 2006; Fernando and Hettige, 2006; Little and Hettige, 2006).

This paper explores the role in this trade of the foreign supplier of qualifications. We start from the hypothesis that while foreign education and qualification suppliers may operate globally, or at least across several countries, they do not necessarily act in a standard fashion across contexts. Rather they operate globally, but act locally, in response to their perceptions of local markets, and the needs and ambitions of students, their consumers. In other words, we hypothesise an interaction between exogenous and endogenous factors in

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doi:10.1016/j.ijedudev.2007.03.002

the development of foreign educational provision across national contexts.

In much of the literature on the contribution of education to economic growth the processes of gaining qualifications and skills formation are treated almost synonymously. In our research we have treated them as related, but separable. The demands by employers and job seekers for both qualifications and skills are motivated by overlapping, but separable goals. Employers, both domestic and foreign, are interested in productivity and, in the private sector, profit. Qualifications signal, although they do not guarantee, skills needed in the workplace. The demands of job seekers are for income earning opportunities which offer social mobility, status and security. Qualifications provide a passport to jobs in a range of sectors and labour markets, local, national and foreign. In some contexts capital flows in to a country in search of low-cost, qualified labour, while labour flows out of a country in search of higher-income opportunities attainable through the same qualifications. Liberalisation affords opportunities for foreign qualification suppliers to operate in countries from which they were previously excluded; and qualification seekers to seek opportunities for study abroad and access foreign education, training and qualifications from which they too were excluded.

An examination of the supply by UK-based foreign qualification bodies to one context only would fail to distinguish characteristics of the exogenous suppliers from those of the endogenous context. Hence, we explore our hypothesis through an examination and comparison of the behaviour of each of seven qualification suppliers across two contrasting education and economic contexts, Sri Lanka and Zimbabwe.

2. The country contexts compared

Among the common characteristics between Zimbabwe and Sri Lanka are policies of liberalisation of foreign trade policy over the past 20 years, colonial ties with Britain, colonial education and qualifications practices, the use of qualifications in socially plural societies for purposes of social mobility and high rates of unemployment among qualified youth. In 1999, the population in Sri Lanka was 18.7 million and in Zimbabwe 12.4 million. Adult literacy rates in 2000 were similar; 91.6% in Sri Lanka and 88.7% in Zimbabwe. Gross enrolment ratios in 1999/2000 in secondary education were different; 72.1% in Sri Lanka and 45.3% in Zimbabwe. The Gender Parity Index was 1.07 in Sri Lanka (i.e. more females than males enroled) and 0.88 in Zimbabwe (EFA Global Monitoring Report, 2002). Economically, both countries have sought to liberalise, though, as we shall see below, with differing results. Both countries have experienced high rates of unemployment among educated youth. Politically, both countries have experienced turmoil in recent years with Sri Lanka's civil war between the majority Sinhalese and minority Tamils stretching back to the late 1970s. Zimbabwe emerged out of a long liberation struggle to attain independence in 1980. But the early years of political calm and prosperity gave way to an increasingly authoritarian state. Sri Lanka's political relations with the West have been generally cordial; Zimbabwe's have been increasingly tense. Both countries have witnessed large-scale politically-motivated migrations of skilled personnel to richer countries, though figures for Zimbabwe suggest that the scale of migration has been of a higher order (Tevera and Zinyama, 2002). Popular destinations for migrants from both countries have been the UK, US, Australia and Canada. South Africa and Botswana are major destinations for Zimbabwean migrants.

Despite some similarities these two contexts are differentiated in several ways. Sri Lanka gained her independence from Britain in 1948 without major political conflict and with a buoyant economy. Zimbabwe became independent over 30 years later in 1980 after years of economic sanctions imposed on the Smith Government by Britain and a hard fought liberation struggle. The fastest growth in enrolments in secondary education are found in the respective immediate post independence periods, i.e., between 1950 and 1970 in Sri Lanka; and between 1980 and 1990 in Zimbabwe.

The role of qualification suppliers at the school level differs. Sri Lanka localised secondary school-level qualifications shortly before independence. At the same time UK-based school-level qualification continued to provide sought after qualifications for the tiny elite who could afford them and who were competent in English. By contrast, Zimbabwe maintained relations with a prestigious UK qualifications supplier for 20 years beyond independence. Only recently has Zimbabwe nationalised school-level qualifications with the intention of fully localising the examination system.

The role of English, both as an official language and as a medium of instruction in education, is also very different. In Sri Lanka, Sinhala replaced English as the official language of government administration in 1956. English was replaced as the medium of instruction in the prestigious schools and universities by Sinhala, the language of the majority, or Tamil, the language of the minority. In Zimbabwe, there is no official language policy. English has continued to be used as an official language of government. After independence Shona and Ndebele (mainly) were employed as media in primary grades 1–3. English remained the medium of instruction from primary grade 4, though in practice local mother tongues are used extensively throughout primary and secondary education, especially in rural areas.

Sri Lanka liberalised her economy after the return to power of the right of the United National Party in 1977. Liberalisation came in two main waves. A first wave of liberalisation focussed on the elimination of quantitative restrictions on imports, the removal for licensing requirements for imports and exports, a reduction of tariffs and revision of export duties. Foreign exchange controls were relaxed and price controls removed. The Sri Lankan rupee was devalued, exchange rates were unified (previously there had been a dual rate) and a floating currency system introduced. Free Trade Zones, with tax breaks for inward foreign investment, and offshore banking facilities were established. This economic regime contrasted sharply with the previous 20 years in which a regime of Import Substitution in Industry (ISI) had been in place. ISI was characterised by import, price and exchange controls, high tariffs, state enterprises and central planning. The 1977 shift in economic policy coincided with the new emphasis in the World Bank's approach to the alleviation of poverty, focused on a reduction of state involvement and increase the role of the market. A second wave of liberalisation reforms was launched in 1989 with support from the World Bank and IMF and their global advocacy of 'structural adjustment.' This involved a greater move to privatisation, further rationalisation of tariffs and the removal of some restrictions on the Export Processing Zones to increase investment and flexibility. Despite the fact that the period of liberalisation coincided almost exactly with the period of civil war, the annual average growth of the economy between 1990 and 1999 was 6.8%, with a GNP/capita of US$ 820 in 1999.

Zimbabwe experienced an economic boom for most of the decade after independence, but from 1987 the economy declined due to what were perceived to be structural rigidities. This resulted in high inflation levels, low and even negative Gross Domestic Product (GDP) growth, growing unemployment, deepening poverty and increasing domestic and foreign debt. This was attributed variously to Government controls on the economy and high expenditure on social services. By 1991, under the strong influence of the World Bank and International Monetary Fund, an economic and structural adjustment programme (ESAP) was introduced. Initially, this led to an increase in economic growth with a high rate of 8.5% attained by 1996 followed by substantial declines and a low of 0.5% by 1999 (Nherera, 2005).

> … the economy, which began to blossom between 1994 and 1997, began to wither in late 1997, when government allowed political ideologies and objectives, hunger for retention of power, and contempt for fundamental principles of democracy, justice, law and order, to override the needs of the populace for a stable and growing economy (the Zimbabwe Independent, 23rd August 2004).

High inflation, chronic foreign currency shortages, low capacity utilisation, low investment, external migration and fuel and electricity problems became endemic (Sunday Mirror, 6th July 2003). The World Bank judged that ESAP had largely failed due to 'external shocks and unsound polices' (World Bank, 2004).

In recent years the liberalisation strategy in Zimbabwe has been seen by the political leaderships as heavily imposed from outside and has been rejected. In Sri Lanka, by contrast, political leaderships of contrasting hues have endorsed and promoted various policies of liberalisation encouraged by the multilateral agencies.

A priori, these characteristics of similarity and difference between the two countries may be seen as conditions which will influence the interaction between the supply and demand for UK qualifications.

3. The field research

The research reported in this paper compares whether UK-based qualification suppliers operate in the same or different ways across country contexts.

Most of the research was conducted between 2001 and 2002, selectively updated by follow up interviews in 2005, and examination of the press and supplier web sites in 2005 and 2007. Several UK-based qualification suppliers were initially identified as providing qualifications in either Sri Lanka, or Zimbabwe, or both. For the purposes of this paper we focus on the five that provide qualifications in both countries, and on two suppliers of directly comparable and equivalent school-level qualifications.

The suppliers covered in this paper are anonymised to protect their commercial and other interests. They are:

- *Supplier A*: a supplier of ICT qualifications from school to post-graduate level in both Sri Lanka and Zimbabwe.
- *Supplier B* who, at the time of the original interview, was providing GCE O and A level and international GCSE examinations in Zimbabwe and had a long history of providing these on behalf of the Zimbabwe government. This supplier also provides business qualifications worldwide including in Sri Lanka.
- *Supplier C* provides GCE O and A level examinations in Sri Lanka and has a long history of providing these qualifications there. It has been in the process of adding some vocational qualifications to its offer in Sri Lanka. It makes no provision in Zimbabwe but is a historically comparable organisation to Supplier B. The two are compared and contrasted in the context of their operations in the different countries.
- *Supplier D* provides high-level professional accountancy qualifications that are available in both counties.
- *Suppler E* provides business qualifications. At the time of interview they were delivering these in Zimbabwe and had a view to expand into the Sri Lankan market.
- *Supplier F* was providing vocational and business qualifications in both Sri Lanka and Zimbabwe.
- *Supplier G* was a university providing distance degrees in both countries.

These suppliers' differing operations in the two countries are discussed below.

3.1. Sample and method

Representatives of UK qualification suppliers were asked in interviews to explain the types of qualification they supply, how they supply them and shifts in their perceptions of the demand for qualifications. The people selected for interview were senior marketing or sales executives responsible for the country or region under investigation.

The selection of the sample of UK qualification suppliers was driven by the presence of their operation in either or both Sri Lanka and Zimbabwe, types of qualification (academic, vocational, professional) and Educational Level. Consideration was given to categorising using the scheme provided by ISCED, but this proved to be over complex for the small sample size. Thus, the educational levels are expressed as Level 1, primary education, Level 2, secondary education and Level 3, post-school education and qualifications. Research colleagues in Sri Lanka and Zimbabwe identified current UK qualification suppliers and the types of qualification on offer. These lists were analysed by the UK team and suppliers identified, largely through information provided in the adverts and websites. The selection of sample cases was guided by the principle of maximal variation. Variation was sought on the two dimensions (i) type of qualification (academic, vocational, professional) and (ii) level of qualification (Level 1, 2, 3).

In the process of selection, only one qualification supplier was anxious to be seen as a global and not as a British supplier in the Zimbabwean context and felt that taking part in an interview would adversely affect their market in Zimbabwe because of current political opposition to perceived British influences. Although a significant supplier in the field, this supplier was dropped from the survey at its request.

The final selection of cases was classified as shown in Table 1 below. As can be seen from Table 1 all suppliers operate in both countries.

Questions were provided in advance in the interview and commercial confidentiality was promised. The nature of this part of the research was explained.

Interviews were semi-structured, the structure being provided by a checklist of questions around which interviewees were invited to talk. The information from the interviews was supplemented with information from web sites and other documentary sources. Where respondents were willing, a brief telephone update interview was carried out in

Table 1
UK qualification suppliers

Supplier	Qualification type and educational level					
	Academic		Vocational		Professional	
	Sri Lanka	Zimbabwe	Sri Lanka	Zimbabwe	Sri Lanka	Zimbabwe
Supplier A	1,3	3			3	3
Supplier B		2			3	3
Supplier C	2		3	3		
Supplier D					3	3
Supplier E			3	3	3	3
Supplier F			3	3		
Supplier G	3	3				

2005 and this was again supplemented by information acquired from the suppliers' web sites and the press. This updating process revealed some continuities over time, but also some changes, especially in the case of Zimbabwe, where the declining economic situation and the hardening of the political regime had presented difficulties to suppliers operating there, despite a continuing perception that demand was consistently high for UK-based qualifications.

The suppliers' operations in each country are first described individually and then compared and contrasted across the two locations.

4. Qualification suppliers

4.1. Supplier A

Supplier A began operations in 1966 as a British government sponsored agency designed to develop computer use in the UK. It soon became a viable commercial operation in its own right and no longer needed government funding. The supplier offers a range of computing courses in both Zimbabwe and in Sri Lanka. The qualifications which are available from this supplier range from introductory courses like the International Computer Driving Licence to post graduate degree level. Additionally this supplier offers a school programme for children aged 4–16, which, coincidentally, was developed in Sri Lanka. This supplier has a virtual campus for online study and automated testing, although this should be considered in the context of just 280,000 reported internet users in Sri Lanka and one million in Zimbabwe as at 2005 (CIA World Fact Book, 2005, accessed February 12th 2007).

The qualifications in Sri Lanka are managed from a regional centre in Dubai and those in Zimbabwe are managed from South Africa. The examinations for both countries are set and marked in the UK. Courses leading to the qualifications are offered in closely monitored tuition centres and a regional moderator verifies procedures, resources and equipment. The tuition centres are allowed a degree of flexibility in how their courses are delivered. For example in some countries it is necessary to focus on English language skills; in others school mathematics education is very good and less time need be devoted to the mathematics components of the courses. Tuition centres may develop their own links with local industries. Information from this supplier's website in 2007 indicates a total of eleven tuition centres across Sri Lanka, an indication of the increase in demand in that country for IT qualifications. Conversely, Supplier A still has only one supplier in Harare, Zimbabwe which recruits directly for its students.

Supplier A observed that changes in demand for its courses and qualifications relate to the level of technological infrastructure as well as qualifications infrastructure. Changes in demand for the courses and qualifications of Supplier A are perceived to occur as countries move from being newly developed countries needing basic IT qualifications because there is no infrastructure or existing standards. These qualifications act as building blocks for a country's own qualifications. Where the standard of state provided education increases, the demand for Supplier A's qualification declines. Supplier A perceives such changes in demand as a sign of 'market maturity.' However, in neither Zimbabwe nor Sri Lanka is there enough state provision as yet for young people wishing to take university-level qualifications. This provider considers that they meet this deficit in the field of ICT studies.

Supplier A identifies different marketplaces in Sri Lanka and Zimbabwe. Sri Lanka is described as being at the stage of peak demand for Supplier A's qualifications. Zimbabwe is at a midway stage of development. The supplier's largest tuition centre in the world is in Sri Lanka and there is currently a move to offer higher qualifications in Sri Lanka at Master's and PhD level. There is a high level of aspiration there among people who can afford international qualifications and currently there is thought to be less confidence in the local qualifications. At the same time there are many livelihood opportunities in the IT sector in Sri Lanka and, while some will use their qualifications to seek opportunities abroad, others will use them in the local economy. Demand for Supplier A's products has increased 'dramatically' in Sri Lanka. Supplier A views the marketplace in Zimbabwe as one where people have no confidence in local qualifications. International qualifications are seen in Zimbabwe as a 'passport to leave the country.' Despite the economic difficulties in Zimbabwe, demand is up, although that demand is not always realised.

Local tuition centres in Sri Lanka charge the market rate for courses locally and the centre remits a royalty in Sterling to the supplier. This contrasts with Supplier D, which charges exactly the same for its qualification in all countries of the world. In Zimbabwe, recruitment and payment is conducted by the local centre.

For Supplier A the main economic barrier to its operations in Zimbabwe is seen as the constant devaluation of the national currency. Difficulties with foreign exchange had been affecting enrolments and this is why the financial administration has been transferred to the British Council. There are no problems with the Sri Lankan economy. On the contrary, the relative weakness of the SL Rupee makes it expensive for students to travel abroad, so they can remain in Sri Lanka and take a complete qualification in their home country. Alternatively, they can take the first two years of a degree in Sri Lanka and follow only the final year in Britain. Charges by centres in Sri Lanka are 'probably among the lowest in the world, [the local tuition centre] relies largely on numbers …though they do find us quite expensive.'

A further contrast between this suppliers' operations in Sri Lanka and Zimbabwe is demonstrated by the Sri Lankan government's provision of a tax incentive to the major tuition centre to bridge the 'digital divide' in that country with Supplier A's qualifications. In Zimbabwe in 2002, by contrast, the Greek owners of the main tuition centre had been locked into the building by war veterans who, according to the supplier, were 'demanding payback for the years of white oppression.' Despite this intimidation Supplier A continues to operate in Zimbabwe in 2007 through the same partner.

4.2. Supplier B

Supplier B has a 150-year history of provision of secondary school qualifications to foreign countries. It has been a major supplier of school-level qualifications to Zimbabwe, but not to Sri Lanka where these are provided by Supplier C. The experiences of Supplier C and Supplier B can be contrasted because they have been providing a very similar set of qualifications, regarded internationally as equivalent in each of the two countries. Supplier B was interviewed in 2001 at a time when they were withdrawing from the supply of secondary school qualifications and the Zimbabwe Schools and Examinations Council (ZIMSEC) was taking over the provision of all school qualifications. Private provision was, and is still, strongly discouraged. For example, there are legal proscriptions on fee increases, discussed in more detail in the context of Supplier F below. From June 1999 ZIMSEC had taken over the management of the O level examinations, Supplier B having assisted in the development of the local examination. From November 2002 ZIMSEC took over the management of the A level process. At that time however some private schools were still registered for Supplier B's examinations and these were allowed to complete the process. The respondent at Supplier B explained these changes in the context where many African countries were localising their examination systems, often with Supplier B's support. ZIMSEC explains on its web site that the process of localisation is needed:

> To effectively cater for the local content aspect of the curriculum, to save foreign currency thus making examinations affordable, for flexibility in curriculum development, in the interest of relevance to our environmental context.

Information obtained in 2005 indicates that Supplier B may in fact still be operating in Zimbabwe, although no official advice exists to that effect. There is a perception that Supplier B's examinations are being provided to private schools that were already registered until the current course is run. It has proved difficult to ascertain the exact position of this supplier currently due to a very wide range of conflicting information in the public domain. The web site of the supplier itself does not indicate that it operates in Zimbabwe.

4.3. Supplier C

Supplier C is the main private provider of English language secondary school qualifications in Sri Lanka. The Sri Lankan government also provides its own exams and the two qualification offerings coexist. Supplier C noted an increase in demand for its exams in the 1980s. According to the respondent, there is a strong aspiration for these examinations, especially amongst the better off, but also in the poorer sections of society who sometimes make great sacrifices to take these exams.

This supplier perceived that in Sri Lanka 'anything from the UK is perceived as good and desirable.' For this reason they retained their older 'London' brand, which had been discontinued elsewhere. We were told that 'people in Sri Lanka like to do the same as is being offered in the UK.' Hence there had been a good uptake for the recently developed AS levels, despite the fact that there were earlier teething troubles with this exam in the UK. On the other hand, GCSEs were not routinely offered in Sri Lanka as the course work components require teachers with special training in moderation techniques and the security implications were more complex. Thus, the O level was offered through the British Council who supervised and administered the exams.

Supplier C also offers a vocational range of qualifications in Sri Lanka. In contrast with its school-level qualifications, which are promoted through their distinctive London/British image, these vocational qualifications are branded internationally. This can be observed in Supplier A's jointly delivered technical courses with Sri Lanka Telecom; an organisation that itself promotes its global nature on its web site.

As noted above, when the Zimbabwe government had a full offering of secondary school examinations in place through ZIMSEC, Supplier B apparently withdrew. The situation is different in Sri Lanka where the examination system was localised soon after independence, but where Supplier C's qualifications continue to be available. Supplier C acknowledges this cohabitation and says that it would not market its brands by making unfavourable comparisons with the local exams, but rather by emphasising the strength of their own brands. One of the strengths promoted is quality control.

4.4. Supplier D

Supplier D was founded in 1919; it received a Royal Charter in 1975

> The Royal Charter recognises [Supplier D] as being among the top professional bodies in the UK, and allows us to qualify people as members. As a chartered body, we are responsible for observing UK government standards.

Supplier D's brochure also emphasises the relevance of its qualification in a globalising world.

Qualifications are for finance professionals and management accountants. Qualifications are provided to students who have the equivalent of A levels or above and GCSE or O Level or equivalent including English and Maths. The Supplier's brochure lists the international equivalent entry requirements for 15 countries. In order to study successfully for the qualification the candidate should be employed in a financial role.

Supplier D provides the same qualification around the world. The exams are identical and they are all marked in the UK. The entry requirement is the UK equivalent. Students can start at Foundation level and do four levels or they can gain exemptions and start at a higher level. All 17 papers from foundation level upwards are available in both Zimbabwe and Sri Lanka.

At least three years relevant practical accountancy work is required to qualify as an associate and this is logged in a career profile. This requirement is in addition to exam passes at foundation, intermediate and final levels. Practical experience must include basic experience, core experience and supplementary experience. The qualification is 'principles based rather than systems based.' This, it is thought, confers *portability*.

Supplier D provides qualifications but not courses. Students attend local tuition centres to study for their exams. Supplier D has a tuition centre in Zimbabwe and opened a Sri Lankan Headquarters in 2006. The opening was attended by Rathnasiri Wickramanayake, the Prime Minister, and dignitaries from the Asian Development Bank amongst others. This shows the increasing importance of the Sri Lankan Market for Supplier D's high-level qualifications. Supplier D study materials are also in competition with publishers of other study materials. Supplier D does no teaching, but provides accreditation for a minimum standard in colleges. Private sector providers deliver all courses locally and tuition is usually 'pretty poor quality.' For example in Sri Lanka, there may be 200 students in a single class. This practice is not endorsed for quality assurance purposes, but the supplier only supplies the qualification and does not control the delivery process. This situation is likely to be improved by the opening of the new Head Quarters in 2006.

Supplier D is the examining body. All exams have an element of practical experience and competencies are assessed in the practical element. Competence can be gained in any company anywhere in the world. Competence is assessed by fellow members who act as volunteers in the interests of maintaining the standards of a Supplier D Qualification. Two assessors review each candidate. Supplier D would like to have this done by qualified, paid, professional assessors and this is now under discussion in the organisation.

In both countries the local offices are responsible for marketing. Everything else is administered from the UK, including payments, registration and exemptions.

The majority of candidates start at foundation level in both countries. Entrance is from 18 years of age. The youngest candidate ever to obtain the full Supplier D qualification was a Sri Lankan. Candidates register straight from school in both countries. Few exemptions are issued. When they are these are usually in Sri Lanka, not Zimbabwe.

In Sri Lanka, Supplier D has a very high status locally because it is 'international' at the same time as having the British Charter. That means it is portable. Half those who qualify with Supplier D will leave Sri Lanka. This is different from the home supplier of this type of qualification which does not have international recognition. Until recently there was little else in the way of business qualifications; now there are at least two, supplied by the 'international'/British body and the 'home' body that does not attract international recognition.

In Zimbabwe, the Chartered Accountants of Zimbabwe qualification has always enjoyed regional reciprocity. So this has a higher profile than that offered by Supplier D. Another UK based supplier of accountancy qualifications also has a higher profile and higher numbers of members. So in Zimbabwe, Supplier D is a third choice. Zimbabwe is not a key market for Supplier D.

4.5. Supplier E[1]

Supplier E has been providing a range of post school business and commercial qualifications in the UK since 1911 and has provided qualifications internationally since 1928. The Supplier is active in 126 countries. The qualifications are based on English standards rather than being adapted especially for the international market and this is believed to lend the qualifications portability.

Supplier E provides qualifications backed up by study materials, support documents, recommended textbooks, 'how to pass' guides, and syllabi. The latter are available on line. Numbers of 'guided study hours' are recommended to pass each exam. The courses leading to the exams are provided by examination centres in accordance with the number of guided study hours recommended by Supplier E to pass.

A commercial agent and co-ordinating authority is appointed in Zimbabwe. This agent is based in Harare, but covers Zambia, Zimbabwe and Botswana. This contrasts with Supplier F which has withdrawn from Zimbabwe and conducts its business from Zambia and Botswana. Administrative procedures, fees, paper distribution and transactions with schools and colleges are dealt with by the commercial agent and co-ordinating authority who effectively act as a satellite doing business on behalf of Supplier E. The final contact is with the Africa marketing manager in the UK. About 30 schools and colleges are contacts in Zimbabwe.

The co-ordinating authority is retained by Supplier E to administer exams including delivering scripts, centre administration, security and fees. The commercial agent acts purely commercially to develop the market. There is no overlap between the respective functions and responsibilities.

Examination centres in Zimbabwe are mainly in Harare with some in Bulawayo and Mashingo. The supplier is trying to extend the locations, but

[1]At the time of interview Supplier E was not providing any courses or qualifications in Sri Lanka. However, this has since commenced through the offices of a franchisee based in Singapore. This reflects a new emphasis on professional and vocational qualifications in Sri Lanka.

communications are difficult locally. Having examined the options, Supplier E prefers not to use the because of the additional costs imposed on the student. In contrast with other suppliers Supplier E faces the difficulties imposed by currency considerations itself.

Competition for vocational qualifications in Zimbabwe is coming from other foreign suppliers, for example Supplier F. There is no perceived competition from local suppliers.

As noted above, demand for business courses and qualifications appears to have increased in Sri Lankan to the extent that Supplier E's Singapore based franchisee is now providing the qualification there. The recent marketing of Supplier E's courses in Sri Lanka emphasises the possibility of using the qualification to gain admission to many UK Universities, and as an exemption qualification for some professional bodies, including for example, Supplier D. This is one of the main contrasts found across the board between the two countries. In Zimbabwe candidates are keen to obtain qualifications that will boost their employment opportunities especially in neighbouring states; in Sri Lanka, students were looking for the highest academic standard qualifications. The new demand for business and commercial subjects in Sri Lanka reflects the changes in demand mentioned by Supplier C and also work carried out by Supplier F (discussed below).

Like all respondents whose organisation operated in Zimbabwe, Supplier E had experienced problems with foreign currency and inflation. Exam fees go up with each series of exams according to what the market will stand. Inflation is very high in Zimbabwe. It is not possible to get money out. Supplier E charges fees in Zimbabwe dollars and will continue to do so despite difficulties. Supplier E does not get any money out of Zimbabwe, but uses it to pay local costs and salaries. Its aim is merely to maintain a presence in the market and invest in the future of what in the past has been a good market. The respondent observed that matters will get much worse in Zimbabwe, but equally that there is a huge potential.

4.6. Supplier F

Supplier F is a merger of two main qualification suppliers, one specialising in vocational qualifications and the other in office and administration qualifications. The vocational supplier was founded in 1878 and merged with the supplier of administrative courses in 1990.

A School examinations board was 'established and administered' by the vocational qualification provider in 1953 and this was merged with two regional school examination awards to create a new body in 1997. The international operation started in 1990 in response to increased demand. In some countries this supplier has assisted in setting up National examination systems and qualification structures.

Two different types of qualifications are offered. Qualification A is offered in single subjects in 'bite-size chunks'; short courses focused on a single exam. The main categories of subject for Qualification A are vocational qualifications in IT, ESOL, office skills, administration, secretarial and business. Qualification A has been very popular in Zimbabwe, but not in Sri Lanka where more academic routes are favoured. The papers are examined in the UK to ensure consistent standards.

Qualification B covers a range of technical and vocational qualifications, including for example Hairdressing, Beauty Therapy, Motor Vehicle Mechanics, Telecommunications, and Hotel and Catering. The qualification is especially designed for the international market and is based on the English NVQ. There are two routes to qualification. The first a Craft Route which is for workers and second a Technician route which replaces HND. There are three levels at Craft Route which equate to the first three levels of NVQ. There are three levels of technician route, the second of which gains exemption from the first year of a university degree.

The assessment of both routes is structured in the same way. A competency statementis assessed by a 'visiting verifier' usually in simulated work circumstances and a written paper. At Technician level, it is possible to take this paper separately from the competency assessment and this is often done by candidates to verify courses taken locally, at the same time as gaining a qualification which has international currency. This is important, especially in Zimbabwe, as it allows mobility in seeking employment. In Sri Lanka, these qualifications are sometimes taken to enter further or higher education and people with the higher-level qualifications can also opt to take further and higher education courses in the UK.

At the time of the original interview in 2000 Supplier F had a branch office in Harare covering Zimbabwe, Botswana, Malawi and Zambia. There were also 300 centres offering qualification A and 80 offering qualification B. In Zimbabwe, students enroled with a privately owned college or centre providing the qualifications. The qualifications are not offered at government colleges which now only offer local (ZIMSEC) qualifications.

According to a follow-up interview in 2005, this has now all changed and Supplier F has left Zimbabwe. It has an unofficial centre in Zimbabwe to offer support to students, but in the main is supplying its Zimbabwe candidates from Botswana and Zambia, to where students travel to sit their exams. The office in Harare was closed for two reasons: firstly because of the difficulties of obtaining foreign currency, and secondly because of legal proscriptions on the raising of fees which this supplier found untenable in the light of very high inflation rates. The respondent spoken to in June 2005 informed us that centre principals had been arrested and imprisoned recently because their fees were deemed to be too high.

Courses and qualifications in Sri Lanka used to be administered by the Ministry of Education, but this was then transferred to the British Council. The British Council is perceived to be very good at administering exams, but does no pro-active marketing and charge a 100% mark up, making the exams expensive for Sri Lankan students. Supplier F has plans to develop associations with individual providers of courses and give exam centre numbers to individual course providers. The British Council would still need to be involved for local quality control and collection of fees. One advantage of the British Council is that it can collect fees in Rupees and remit them in Sterling. According to a web site press release Supplier F opened a branch office in Colombo in early 2003. Skills development funding from the Asian Development Bank and greater demand from the Sri Lankan government for skills-based vocational training has led Supplier F to work jointly with the Sri Lankan government to develop the skills base and vocational qualification infrastructure of the country. Supplier F's qualifications taken in Sri Lanka carry the imprimaturs of both Suppler F and the government, giving them local and international currency.

Demand for the qualifications offered by Supplier F waned in the 1970s once newly independent nations had their own qualifications in place. It started to increase again in the 1980s. The international business came back without trying in the mid 1980s. Supplier F set up its international arm in 1990 to cope with this increased demand. At the time of interview (July 2000) demand in Zimbabwe was increasing by about 10–15% per annum, despite economic difficulties for candidates. Demand in Sri Lanka was flat at the time of interview because of the effect of the high mark up charged by the British Council. Greater marketing was planned and as mentioned above there a link has since been made with the Sri Lankan Government.

In Zimbabwe, secretarial qualifications have been extremely popular. IT is also popular but there is no demand for ESOL in Zimbabwe. In Sri Lanka, the demand for courses leading to Qualification B is mainly for telecoms, electrical and electronic engineering at technician level. Motor Vehicle Mechanics, Mechanical Engineering and Construction Engineering are 'taking off' in Sri Lanka. There is an IT qualification at level 4, but Supplier F emphasised that it cannot compete with the qualifications provided by Supplier A. In Zimbabwe, there is a strong demand for Telecoms. Electrical and Electronic Engineering and Motor Vehicle Maintenance, and Quality Assurance qualifications are also popular. Hotel and catering and International Tourism were selling well at the time of the interview in 2001. In 2005, an opportunity for training had opened with the Sheraton group, but this was one of few that students would take to remain in Zimbabwe, preferring to gain qualifications with international portability instead. Also popular in Zimbabwe are market research, teacher training, retail and assessor awards.

In Zimbabwe, students are keen to obtain a qualification that will get them a job. In Sri Lanka the qualification has not been particularly well known. There, it is used for progression to university; the demand is for the highest possible qualification. In Zimbabwe parents scrimp and save to put their children through these qualifications. They are highly rated by parents, and students value them for onward study and employment. In 2005, Supplier F described demand in Zimbabwe as very high but 'for the wrong reasons.' Students wanted the qualifications in order to leave the country and gain employment in neighbouring states. Supplier F qualifications are promoted as added value to home qualifications, not as an alternative.

In Zimbabwe, these qualifications are said to be are well known by employers. They had been advertised on TV and radio and in the papers and according to Supplier F employers were happy to recommend them to their workers. Employer seminars had been held to promote the qualifications and some centres are employer's own training departments. These activities have now ceased, due to economic and political pressures.

In Sri Lanka, the operation had been in the hands of the British Council and no pro-active marketing had been carried out. The Supplier had plans to address this issue and in early 2003

> signed a co-operation agreement with the Sri Lankan Ministry of Tertiary Education and Training to assist with strengthening Sri Lanka's vocational and technical framework (source: web site press release).

The same press release observes that Supplier F's vocational qualifications (Qualification B) 'are widely accepted worldwide including the Gulf States for employment and educational advancement' and that with these qualifications 'the employability of Sri Lankans will make them an attractive proposition for local and international industry'.

An international web site for both sets of qualification provides a wealth of information for students, centres and employers on qualifications and how to obtain or provide them. The qualifications are promoted on the web site as 'globally recognised.'

The cost in Sri Lanka is relatively high because of the mark-up costs of the British Council. In Zimbabwe it can be very difficult for candidates to afford the qualifications, but demand continues to rise because of the improved chances of gaining employment and international mobility for jobs and university education especially from the Technician qualification.

Withdrawing from Zimbabwe had caused this supplier some concern. A 'not-for-profit educational charity,' they had been committed to remaining in the country, cross subsidising the operation from other countries where a surplus could be generated. However the situation was increasingly viewed as untenable, especially in view of the risk of arrest for increments in fees and the absence of a free market.

4.7. Supplier G

Supplier G is part of a prestigious, federal University that has had degree-awarding powers since the mid nineteenth century and has run a distance-learning programme for students studying nationally and internationally since 1858. The organisation is a federation of separately incorporated and self-governing academic institutions. The institutions that constitute the federation attract large numbers of UK and foreign students for face-to-face courses, and some offer degree-level courses through distance and blended modes directly. Our case study however focuses on the centrally coordinated federal programme of distance courses on which, currently, some 30,000 students from 190 countries (including the UK) are registered annually for courses of study. These 30,000 complement the more than 100,000 students following courses through the face-to-face mode annually.

Supplier G provides academic (and professional) qualifications mainly at Level 3 (i.e. Bachelor's degree, postgraduate diploma, Master's and doctoral. The pre-degree diploma may be regarded as a Level 2 qualification. An access course is provided for those who do not have A Levels. Bachelor's degrees (BA, BSc, BD and LLB) are available in a wide range of subjects with each being provided through a 'lead college' of the federal university Short modular courses are available at Master's level for those seeking individual or professional development. These are available in a range of professional areas including Laws; Human Resource Management; Environmental Studies; Veterinary Studies; Accountancy, and Agriculture. Postgraduate diplomas are available in the same areas as master's degrees. These include Business; Health; Agricultural studies; Finance; Orthodontics; Distance Education, and United States Studies. Because of the size and nature of the University the potential study areas are wide and varied.

The market for Supplier G qualifications in Zimbabwe and Sri Lanka should be seen in its respective regional context.

In the Africa region total registrations have increased from 839 in May 1994 to 1370 in January 2000. This is modest, in view of the total registrations of 30,000. Countries demonstrating growth (but from very differing starting points) include Botswana, Ethiopia, Gambia, Ghana, Mauritius, Rwanda, South Africa, and Tanzania. The market in Zimbabwe grew from 80 in May 1994 to 132 in August 1997, followed by a decline to 69 in January 2000. The majority of registrations from Zimbabwe are at the post-graduate level. For example in January 2000, 51 students registered at the post-graduate level compared with 18 at undergraduate level. The 51 registrations are spread widely across 21 courses. While some courses attract only a single student, others attract groups of students. In

January 2000, 12 students registered on the 'environment' courses, 15 on various Agriculture and Rural Change courses, and six on economics and finance courses. At the undergraduate level where 18 students were registered, the Bachelor in Law (LLB) attracts the largest single group of students.

In the South Asia region registrations have grown more rapidly though remain small in the global context. Over the period May 1994–January 2000 registrations in South Asia increased almost six-fold, from 234 to 1311. Sri Lanka shows consistent growth from 116 in May 1994 to 386 by January 2000, a number only slightly smaller than Pakistan (398) but larger than India (201) and Bangladesh (256). And in contrast with Zimbabwe, the majority of registrations in Sri Lanka are at the undergraduate level. Of the 386 registrations in January 2000 only 10 were at postgraduate level. In January 2000, the largest undergraduate registrations are found in the subject areas of economics and management (74 on the diploma in economics, 39 in economics and management, 35 in management and 15 in management with law), the LLB (69) and computing (73 on diploma and degree).

Although the registrations in Sri Lanka and the South Asia region in general are increasing, the numbers of students remain small when compared with those in East and South East Asia. In 1997, for example, student registrations in Singapore, Hong Kong and Malaysia were 6892, 4808 and 4680, respectively.

Like each of our case study qualification suppliers, Supplier G has an extensive website with information on a range of matters, e.g. study weekends in lead colleges, education exhibitions worldwide, and full details about study. In addition, the programme relies on a range of print materials to market its courses, education exhibitions and visits, referrals by other agencies and word of mouth.

Central office staff monitor information from those who enquire about courses about how they came to learn about the course. Between 1999 and 2001, the largest numbers of enquiries from Zimbabwe came through the local Rapid Results College, the World Wide Web, the British Council, friends and family referrals, and schools and colleges. In the same period the largest number of enquiries from Sri Lanka arose through the World Wide Web, advertisements in the Sri Lankan Sunday English press, educational exhibitions, newspaper adverts associated with the exhibitions and referrals from friends and family. The marketing brochures set out the benefits of studying for a Supplier G qualification and the benefits of studying as an external student. The brochure contains extracts of statements by successful students, and importantly, on the equivalence of standards with the face-to-face degrees. The costs of courses are the same worldwide. However non-EU students are charged slightly more than EU students. The costs are broken down into: Application fees; exemption fees; initial registration fees; continuing registration fees, and examinations fees. An undergraduate degree costs between £1500 and £2500 to complete and a postgraduate degree between £7000 and £10,000 depending on the amount of support required. Additionally, local centres charge a tuition fee and examination fee. Study materials are provided, but textbooks are extra. Fees are charged in pounds sterling.

5. Synthesis

By way of synthesis we demonstrate how suppliers operate globally in the qualifications market place and, simultaneously, act locally, responding flexibly to local conditions prevailing in the two contrasted country economies.

5.1. Operating globally

All the suppliers interviewed claimed to be engaged in internationalising and globalising their activities.

Some suppliers emphasised the global nature of their qualifications, especially in promotional literature aimed at the international market. For example, Supplier B advertised skills and career awards on its web site as being 'internationally accepted'. They offered a

> local context—a global approach—the awards are designed to exploit knowledge of local economies and business practice, and then place this knowledge in a global context.

Supplier C described its qualifications as

> world class qualifications delivered locally… recognised globally.

As a provider of accountancy qualifications Supplier D discussed the impact of globalisation in some detail in its promotional literature:

> Financial markets-even entire economies—are shaken by seemingly insignificant faraway events. New industries arise overnight. Fortunes are made and lost in hours, not years. Welcome to the business world of the 21st century. A world where everything is connected and nothing is predictable. Where knowledge and imagination are more valuable than physical assets. Where there are no geographical boundaries. A world of great uncertainty. And great opportunity…There has never been a more exciting time to begin a business career. And there has never been a greater need for people with talent and vision. People able to grasp the opportunities offered by collapsing barriers to trade, to harness the technology that is revolutionising the way we buy, sell and communicate (Brochure, p. 3).

Supplier F describes its qualifications as 'globally recognised.'

Supplier A was global in its approach to supply and claimed that it specialised in setting up an infrastructure that operates on a global basis to global standards. Thus it had decentralised its international operation and was managing its Sri Lankan qualifications operation from an office in Dubai and its Zimbabwe operation from Cape Town. Although the examinations were usually set and marked in the UK a regional moderator was used to verify procedures locally. At the time of interview a recent development was to have scripts from Sri Lanka marked in Kuala Lumpur and those from Zimbabwe marked in Cape Town, rather than sending scripts back to the UK. This was attributed to increasing standards and infrastructure in these countries. It probably also made sense in terms of cost, although this was not mentioned in the interview. Flexibility of approach and attention to diversity and cultural differences were highly valued by this supplier. It described its examinations as 'culturally unloaded'. It was possible for tuition centres to vary the delivery of courses according to local strengths and weaknesses. For example, in some countries, early mathematics education was very good and so less time could be spent on this component in favour of another.

Supplier D operated the most standard approach across the two contexts. For example it charges the same fees in all countries and charges in Sterling in all countries except Zimbabwe, where there are foreign currency restrictions. In countries like Zimbabwe and Sri Lanka this makes their qualifications very expensive. Supplier D said its qualifications were very 'Colombo Centric,' in Sri Lanka, meaning that few students from other parts of the country could afford to enter for the qualification. Supplier D shared Supplier C's view that decisions about qualifications in Sri Lanka were family based, rather than individually made.

Supplier C was noting a small increase in independence from students, who are now choosing business subjects rather than natural sciences. While in most countries they market directly to employers, in Sri Lanka it is parents who are targeted.

Internationalisation of supply could be a response to a sudden increase in demand from developing countries in general from the late 1980s onward. Suppliers had different explanations for increases in global demand for their qualifications. For example, Supplier F said that demand had declined in the early 1970s once newly independent nations had their own qualifications in place. However the international business came back 'without trying' in the mid 1980s and the supplier set up an international arm in 1990 to cope with the increase in international demand. This supplier was in the process of working on low demand for their vocational qualifications in Sri Lanka by entering into a partnership with the government to improve vocational education.

Supplier A had tracked the way changes in international demand for IT qualifications had developed. In this supplier's view there would be an increased demand for higher levels of qualifications as the country developed its own qualification system and IT infrastructure. Supplier A's IT qualifications were seen as acting as building blocks for a country's own qualifications. Sri Lanka was defined as being at a peak of demand for Supplier A's IT qualifications, and was described as being at a 'midway point in development.' Demand was linked to educational provision in a country as well as aspirations for a particular qualification. Supplier A noted that as the standards of state provided education went up in a country there was less demand for their products particularly at the lower levels.

Supplier D was able to point to a university closure in Sri Lanka during the 1980s as providing a boost to demand for their high-level accountancy qualifications there. A perception that locally administered qualifications might be error prone or open to corruption also provided impetus to take foreign qualifications in both countries. Most promotional literature spoke of the expanded employment opportunities both at home and abroad provided by the qualification concerned. Two suppliers described their qualification as being used in Zimbabwe as 'a passport out of the country.' Many of the qualifications being supplied in Sri Lanka offered students improved opportunities to work abroad.

Some suppliers equated raised global demand for their product as either connected to their marketing activities or otherwise inexplicable. Others were able to associate changes in demand with developments both in terms of the education systems of developing countries and in terms of globalisation and its impacts upon the needs of a country's economy, the individual needs of young people; their parents, and the requirements of employers.

5.2. Acting locally

Suppliers responded to local conditions in different ways. Sometimes this meant emphasising the companies British rather than global provenance. Supplier F had attributed the high demand for its courses in Zimbabwe in part to perceptions of integrity. Rather than globalising its operations in respect of exam marking it had thus kept this in the UK. Supplier C strongly promoted its British provenance in Sri Lanka where that lent prestige to its academic qualifications. Their UK exams may have been perceived as having a higher degree of quality control. On the other hand this supplier used its international branding to offer jointly delivered technical and vocational training courses. Supplier G similarly emphasised its London base as a distance university on its web site. Supplier G combines the global approach in offering students 'an internationally recognised qualification without leaving your home country' at the same time as promoting its 'distinguished heritage.'

There may be a perceived value in having a distinctive UK brand in an increasingly internationalised market place, with qualifications available from, *inter alia*, the US, Australia, South Africa, India and Singapore. This distinctive brand approach was most often used in Sri Lanka. In Zimbabwe, where the relationship with the former colonial power is at best ambivalent, this was not always seen as the best policy. Of suppliers approached to be interviewed in the UK, one declined, and this was because they particularly wished to avoid be seen as British in the Zimbabwe context and were actively advancing a 'global' presence in this context. Our research into UK suppliers might have categorised them in a way they sought to avoid.

Administration of Supplier D's examinations was entirely UK based, but the tuition was delivered locally and was described as usually 'pretty poor quality.' That said the supplier estimated that half the Sri Lankans who acquire their qualification will use it to take abroad in search of employment.

5.3. Localising exam systems

In Sri Lanka, a thriving market for UK and many other foreign qualifications has been noted in the context of a liberalised economy (Little and Evans, 2005; Little, 2007). Suppliers indicated to us that a UK-based qualification had a special kudos in the Sri Lankan market. Students aspired to obtain qualifications at the highest possible academic level to improve their employment prospects, both in Sri Lanka and abroad. This reflects in part a shortage of university places and also the high status attached to academic qualifications. However, both Suppliers F and E had responded to an increased demand for business, commercial and vocational subjects by increasing their supply and in the case of Supplier F working with the government to improve provision of these qualifications.

The experience in Zimbabwe for most suppliers has been in contrast to the success enjoyed in Sri Lanka. Supplier A described demand as being up in Zimbabwe although not always realised. Students were aspiring to this IT qualification but not always able to achieve their aspirations. The supplier had problems with the high rate of inflation and the devaluation of the Zimbabwe dollar. Like other suppliers they were charging in sterling for their qualifications and this was very hard to obtain in the country, and like other suppliers they were using the British Council, who could accept the local currency and then remit to the supplier in sterling. This supplier was limited in its tuition centres in Zimbabwe and continued its operation despite the tuition centre having been targeted by war veterans.

Supplier F had modified its arrangements in Zimbabwe recently. As a not-for-profit educational charity it invests surpluses from its operation in some countries into countries where there is decline or difficulty. It had recently run into serious difficulties in Zimbabwe, where, with inflation running at more than 300%,[2] the government had made it illegal for private education suppliers to increase tuition fees. There were also difficulties obtaining tuition fees in Sterling although the British Council had been assisting with this. The expressed reasons for closing were economic, although according to the BBC in May 2004, the Zimbabwean education minister was preventing private schools and qualification providers from raising fees because

> They throw Africans out simply by hiking fees. We are dealing with racist schools. They are all former white schools; all racist (http://news.bbc.co.uk/1/hi/world/africa/3689903 accessed on 9th August 2005).

There may also have been political difficulties in continuing the operation.

Supplier F had therefore reluctantly closed their Harare operation although there is still someone there unofficially to offer support. Nonetheless, demand is consistently high for their qualifications and students are travelling to Botswana and Zambia to take exams. The respondent regretted that the law now appears to preclude the operation of a free market in Zimbabwe. According to the Zimbabwe Herald (Friday, 5th August 2005) however, state school fees are to be increased by 1000% (one thousand per cent) backdated to January 2005.

Supplier B had extensively modified its arrangements to supply qualifications in Zimbabwe. At the time of the original interview for this research in December 2001, the supplier was in a process of transition having been the main provider of school-level exams like O levels, A levels and International GCSEs.

Foreign currency in Zimbabwe was a constant theme among suppliers in Zimbabwe. Foreign suppliers tend to require their fees paid in their own currency and on top of the difficulties in finding the fees in the first place this are an additional burden for students and their parents. However, in Sri Lanka the possibility to obtain foreign qualifications without costly travel abroad was welcomed by students and their families and this affected the marketing of qualifications in Sri Lanka where suppliers also recognised the importance of families in decision-making about qualifications.

[2]The rate of inflation in Zimbabwe is continuously rising. No figure included in this paper will be correct at the time of publication.

6. Conclusion

With the exception of Supplier D, UK-based suppliers of qualifications to Sri Lanka and Zimbabwe interact with the demands and characteristics of the respective markets in which they operate. It is significant that Supplier D is exclusively a qualification supplier, rather than a supplier of courses and qualifications. The necessary involvement of domestic private suppliers in the delivery of courses leading to Supplier D's qualifications means that the student experience varies across the two contexts.

Contemporary factors which appear to have influenced the interaction in our two country contexts are the availability of foreign exchange (less available in Zimbabwe); legal frameworks and constraints (more in Sri Lanka); the technological and economic development of the country (stronger in Sri Lanka); strength and orientation of external political relationships (weak and hostile to the West in Zimbabwe); the availability of alternative qualification and course delivery systems, domestic and foreign; local, national and foreign labour market opportunities (local and national opportunities in Sri Lanka greater); and brain drain motivated by frustration with the political and economic environment (high from Zimbabwe). It is also clear that different UK-based qualification suppliers offering similar levels and types of qualifications organise their operations differently even within the same foreign context.

The interaction between global and national/local histories is also illustrated by these cases. While both countries have been subject to trends in the global economy and to policy prescriptions of a global nature over time (e.g. colonial export economy, oil crises, externally prescribed polices of structural adjustment and liberalisation) the point in this global history at which each country gained its political independence from the UK varied by more than 30 years. Sri Lanka localised examinations, course content and medium of instruction at independence from 1948 at a time when global policy prescriptions were moving towards inward-oriented import substitution and localisation, and when national political forces were moving from the right to the left. Zimbabwe's education system is shifting in this same direction currently, over 20 years after independence and more than 50 years after Sri Lanka. While many Sri Lankan students are now rather unprepared to take advantage of English-medium qualifications on offer in international marketplace of qualifications, Zimbabwean students, because of their English-medium education, are much better placed. However, the economic and political complexion of Zimbabwe means that those few students who can afford to gain foreign qualifications are likely to use them to leave Zimbabwe.

This comparative study has at least four implications for the study of education and qualifications in the context of globalisation. First, and most generally, the study confirms our initial hypothesis that exogenous and endogenous factors interact to generate both the demand for and supply of foreign qualifications. While this hypothesis is confirmed by our limited number of case studies in two country contexts, studies of non-UK suppliers in these contexts and of UK and non-UK suppliers in other countries/contexts are needed to extend and challenge the general proposition.

Second, our cases have suggested that foreign education suppliers are more likely to adapt their behaviour to national and local contexts when they supply more than the examination and qualification. The award of a qualification is the end result of a long chain of curriculum, pedagogic and assessment activities to which foreign and local suppliers contribute differentially. While some activities may be standard across contexts (e.g. the content of the text books and examination) others may vary considerably (e.g. the type of delivery as between face-to-face, on line, print at a distance, blended). We suggest that the more involved is the qualification supplier in all links in the curriculum–pedagogy–assessment–qualification chain the less standard will be its profile across contexts. The less involved in pedagogy and curriculum, and the more focussed on assessment, examination and qualification alone, the more likely it is that operations will become standardised across contexts. These hypotheses require confirmation across a range of suppliers and contexts.

Third, on the basis of our two country contexts, we have identified a range of contemporary factors that appear to be influence the interaction between UK qualification suppliers, their perceptions of local markets and the needs and ambitions of students, their consumers. These include the availability of foreign exchange; legal frameworks and constraints; the technological and economic development of the country; external political relationships; the availability of alternative qualification and course delivery systems, domestic and foreign; and local, national and foreign labour market opportunities. These factors differentiated the contexts we studied. Future studies of relations between UK and non-UK suppliers across a range of contexts should draw on this list for purposes of confirmation—but should also seek to identify additional exogenous and endogenous factors at play.

Finally, the interaction between global pressures and national/local histories, illustrated by these cases, deserves fuller exploration. Even where contemporary endogenous economic, political and education characteristics appear to be similar across contexts and where a qualification supplier appears to be acting in a standard, context-neutral way, differential education and qualification histories are likely to influence the interaction between contemporary exogenous and endogenous factors. The marketplace for the global education business is highly differentiated.

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