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School as "Edu-business":
Four "serious players" in the Swedish upper secondary school market

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Abstract
In the early 1990s, Sweden experienced state policy reforms, which opened the way for new, private actors to run publicly funded independent schools. In 2010 the independent schools recruited almost a quarter of the upper secondary students. More than eight of the ten schools were managed by limited companies. Against this backdrop, and drawing on Ball (2007) and Whitfield (2006) who focus on policy trends of the transfer of public education (and other public services) to the private sector, this article explores and analyses current commercial trends in Swedish upper secondary education. The aims are to identify expansion trends inside and outside Sweden, including new trends of business formations. In the study four large actors were identified on the basis of official data, company reports, school and company websites and national and international media. The study indicates that the upper secondary education in Sweden has today become "big business", or "edu-business" (Ball 2007:67).

Keywords: upper secondary education, independent schools, school market, education companies, Sweden

Introduction
In many parts of the world, particularly in the OECD countries, the delivery of education has increasingly been transformed by market-oriented approaches linked to policies of choice, competition, private schools, and increased autonomy at local levels (Björklund et al., 1995; Ball, 2007; Apple, 2010). Following the US economist and Nobel Prize winner Milton Friedman, who in the 1950s outlined the idea of publicly funded, privately run so-called "charter schools", proponents of similar systems argue that education can thereby be carried out more effectively and be of higher quality (Chubb and Moe, 1990; Finn, Manno and Vanourek, 2001). Likewise, in Sweden in the early 1990s it was suggested by the then new conservative-centre-liberal-Christian democratic coalition government (1991–1994) that new financing and education policies were needed for modernisation and to reduce public sector costs. The new policy direction as outlined in successive governmental bills, one entitled *"Freedom of choice and independent schools"* (Govt. Bill, 1991/92:95, also see Govt.

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Bill, 1992/93:230), including the state budget (Govt. Bill, 1992/93:100), suggested that the onset of a student voucher system and the promotion of new, publically funded so-called independent schools (also called free schools) run by non-public providers would contribute to flexibility and pluralism in pedagogical practices, enhance teachers' professionalism (cf. Lundström, 2007) and result in better learning outcomes. The aims were to create "Europe's best school" and "strengthen Sweden as a knowledge nation" (Statement of Government, 1991:10). Before the onset of the new policies, Swedish upper secondary education, or post-16 education, free for all and directed to virtually all 16–19 year olds, was almost exclusively provided by the municipalities, whereas private alternatives were extremely scarce (National Agency for Education, 2006).

Since 1992, competition has been imposed on all schools, both the publicly run and the independent schools. For about two decades, the overall expansion of independent schools in the country has encountered few policy hindrances. In the last years of the 2000s, a "boom" of new independent upper secondary schools was noted (cf. Dagens Nyheter, 2008) which signified the establishment of a highly competitive school market in upper secondary education (National Agency for Education, 2010).

Following on from a previous study on how the marketisation of education was represented in public discourse (Erixon Arreman & Holm, 2011), and within a larger research project (2008–2011) on marketisation trends in Swedish upper secondary education1, this article explores and analyses current commercial trends in the Swedish upper secondary sector. The aims are to identify expansion trends inside and outside Sweden, including new trends of business formations in the independent upper secondary sector in the last years of the 2000s and in early 2011. For the study, a broad set of data was collected. Official sources include research and reports, press releases and newsletters from national authorities and official statistics. Given the lack of official information on companies, school ownership and business transactions in education (cf. Alm Rosenblad & Rutgersson, 2011), a variety of non-official sources, including the media, were needed to fill the gap. Accordingly, we consulted company and school websites, including company press releases and annual reports, and also media. The media tends to highlight and reflect current trends in society, including the business sector and education. Print, broadcast and web-based media sources include major national and regional daily newspapers, widespread TV-channels, teacher union press and national business media. However, the status of the "non-official" media news on company and company transactions were controlled and verified, and also questioned in relation to other media sources, annual reports and official documentation. It is important to mention that this study relates to the conditions of the Swedish School Act which applied at the time of the research project within which this study was carried out.[2]

For the analysis in this article, we draw in particular on Ball (2007) and Whitfield (2006). Ball (2007) identifies a new discourse of education that is oriented to the market and which is underpinned by a specific rhetoric and actions which altogether, following Ball, constitutes a *market discourse*. By discourse, Ball refers to both the production and circulation of language (or discourse) and how a discourse regulates language and promotes new ideas (cf. Foucault, 1972). According to Ball, the market discourse emphasises the need for reforms and new ways to deliver education for the suggested benefit of the individual and knowledge production in the country. It includes ideas that the marketisation of public services, of which education is traditionally a part, will promote the "national competitiveness" (Ball, 2007:7) of the state and thereby secure economic growth not only within the country but also increase its competitiveness globally. Ball also points to a "structural coupling" among the market discourse, business interests and market policies (Ball 2007:3). Like Ball, Whitfield (2006) points to structural relations between business interests and market policies, with the shared aim of restructuring services traditionally delivered and financed by the welfare state. Whitfield defines the privatisation and marketisation of the public sector as two interrelated processes which are fuelled by competition, the introduction of choice and commercialisation which, in turn, create new markets for private firms, while trade union organisations are simultaneously weakened. Other typical features of market policies Whitfield (2006) mentions include the sale of publicly owned assets, including companies, housing and land.

Swedish upper secondary education – post-16 education for all

Within Sweden's long social democratic welfare state tradition (Sainsbury, 1996), the wider aims of post-war school reforms, including the upper secondary sector, were to promote equal opportunities, economic and social justice and citizenship for democratic purposes. From the early 1970s, post-16 education was directed to virtually all 16–19 year olds within the then new national curriculum of "Gymnasieskolan" which included a variety of theoretically and vocationally oriented study paths (Lundahl et al., 2010). In line with the democratic ideals to provide equal quality education irrespective of local conditions, upper secondary education, free for all, was financed and regulated by the state although primarily distributed by the municipalities (Marklund, 1989). National syllabi governed the study paths, and national standardised tests and a norm-referenced grading system were used for the grade setting of student performances. Detailed national rules also applied to the quality and equipment of school premises, including physical education and laboratories. Other state-regulated services offered to students for free and by appropriately qualified staff included schools meals, a physical and psychological health service, and study guidance and counselling. Teachers were employed by the state on the basis of demands for formal qualifications in specific school subjects and subject areas, including formal teacher training, which was also strictly regulated and provided by the state (Erixon Arreman, 2005).

In the late 1980s the state control of education weakened and the municipalities were given greater freedom for school development and teacher employment, although still under the overarching control of the state (Lundahl, 2002; Lundahl et al. 2010; Rönnberg, 2011 cf. Edström, 1995). In the early 1990s, new policies drawing on economic and social ideas of management and results by goal-setting were introduced for the funding and regulating of public services, including education (Blomqvist & Rothstein, 2000; Govt. Bill, 1992/93:100). The previous detailed financing system was now replaced by a lump sum given by the state to the municipalities for education and other public services (Björklund et al., 2005). In line with the new system, a new national "goal-oriented" curriculum and goal-oriented syllabi for the study paths were introduced in 1994. Similarly, a new, goal-oriented grading system was designed (Wikström & Wikström, 2005). Under the new goal-setting polices, the control and implementation of education was transferred from the national to the local levels, or decentralised. The national goals of the curriculum, syllabi and grading system were now to be locally interpreted by staff and school leaders at each public and independent school. Responsibilities for teacher employment (and teacher salaries) were also handed over from the state to local levels, including independent schools (Lundström & Parding, 2011; Ringarp, 2011). At the national level, a new authority, the National Agency for Education, was set up to serve as a node for gaining and spreading knowledge on education – though not for control – and for licensing the new independent schools (Jarl & Rönnberg, 2010).

The Swedish independent school system

The new Swedish policies combine the transfer of state responsibilities to the local level with the promotion of new, independent school actors with the generous funding and weak regulation of the independent schools. The policies seem to have few or even no counterparts elsewhere (Ministry of Education and Culture, 2006; Ministry of Education, 2011), which is why they are often considered to be unique (Björklund et al., 2005; Baggesen Klitgaard, 2008; Lubienski, 2009). For Chubb, who is a fervent proponent of free market policies in education, the Swedish policy system is distinctive since in his view it does "full justice to the principles of the market" (2007:53–54). The strengths recognised by Chubb include the almost equal financing of independent schools, no local veto against establishment, the open attitude to all providers including profit-maximising organisations and no limitations on the number of schools. In the UK, the so-called "Swedish model" of independent schools is used by the Conservative Party to promote a similar system of new "Academy Schools" (Wiborg, 2010; Conservative Party, 2010).

What then are the traits of the Swedish system for independent schools? As already mentioned, the independent schools are fully publically financed, free to attend, and should also be open for all (National Agency for Education, 2011a). Students may choose the school they like, public or independent, and anywhere in the country (National Agency for Education, 2007).

The funding is received via a student voucher which is funnelled through the municipalities, although granted by the state (Govt. Bill, 2008/09:171). Since 2003, the sum of the student voucher is recommended by the government on an annually updated national "price list" ("Riksprislista"). In 2009, the recommended sum was € 10,972 per year for an average independent upper secondary student (National Agency for Education, 2008a). The government's decision for a new price list with "fixed" and lower funding from January 2010 was however met with harsh criticism from the National Association for Independent Schools (Friskolornas riksförbund, 2010), which is why the government revoked it and reintroduced the previous higher funding for the first six months of 2010 (Ministry of Education, 2010).

Various forms of non-public actors which can acquire licensing include individuals, parents, interest groups, religious communities and business companies. This means that in a legal sense independent schools are private. All companies (co-operative societies, limited companies, sole proprietorship, trading companies) have the right to freely use the surplus of the student voucher (Ministry of Education, 2008, 2011).

Up until 2008 licensing was handled by the National Agency for Education and thereafter by the then new authority, the Swedish School Inspectorate. In the licensing process, the views of the municipality concerned regarding the assumed effects of a new independent school for the overall local school situation might be taken into consideration by the national authorities, although the municipalities have no veto powers (School Act 1985, 2010; Nylén, 2011). The principles for licensing an independent school as formulated in the Swedish School Act (SFS 1985:1100 Ch. 9, 8 § 1-5) were applicable when this study was conducted. The principles included that the applicant should be able to provide opportunities for all students to complete their education and to qualify for entry to higher education. Another precondition was that the school should be open to all, "excepting students in need of extra support and therefore in need of extensive funding or organisational disadvantages to the school". Additionally, there should be a willingness to recruit teachers whose training corresponded to that deemed necessary for the teaching role. Exceptions were allowed where there were no suitably qualified teachers available, or when the situation allowed other possibilities.

Although formally required to comply with the overarching pedagogical demands of the public school sector, independent schools had fewer responsibilities and fewer regulations. Up until 1 July 2011, they were freed from the more costly demands on public schools to provide specific and well-equipped premises (gym halls, science laboratories, school meal premises). They were also exempted from public schools' obligations to hire staff and organise and provide premises and equipment for social services (health care, school meals, school libraries) (Ministry of Education 2008). Nor were they obliged to have adequately qualified study and guidance officers. Further, independent school actors did not have to provide facilities for students with functional hindrances.

The frameworks of the policies for independent schools, including the practice of these policies, have been questioned in various ways. In the mid-2000s the policies met with harsh criticism from the national audit office for being too weak and for not being practiced in accordance with the intentions of the Parliament and the School Act (Riksrevisionen 2005:11–12). The national audit office noticed that many independent schools had few appropriately qualified teachers, which was not in line with the formal policy declaration of the school made when it sought licensing to provide competent teaching staff. The government and the national education authority were therefore criticised for shirking their responsibilities to provide high quality education as they did not use their legal powers to hinder or stop independent schools which had few qualified teachers. Though teaching competency has gradually increased in the independent sector, there still tend to be fewer qualified teachers than in the public schools. For example, in 2008/09 about half (54,6 percent) of the teaching staff at independent upper secondary schools had formal teaching qualifications, whereas in municipal schools, the proportion was almost eight out of ten (78,1 percent) (National Agency for Education 2010b).

Also, tendencies of "grade inflation" or too high a grade setting in upper secondary education, and particularly at the independent schools, were criticised in research studies in the 2000s (Wikström & Wikström, 2005; Henrekson & Vlachos, 2009). Henrekson and Vlachos, researchers at the Swedish Research Institute of Industrial Economics, considered the effects of grade inflation as negative for both individuals and the production of new knowledge in the country as student recruitment to higher education in Sweden is primarily based on final grades in upper secondary education.

In a report entitled *The Competition for Students* the National Agency for Education (2010a) found that policies for competition between all school actors which had led to the ongoing growth of new independent schools had not only caused great instability but also higher costs for the upper secondary school sector. Despite the various problems identified, the authority saw few opportunities to alter the situation within the current policy system.

Expansion trends of independent schools and school companies

In the first decade of the 2000s the expansion of new schools was primarily related to the establishment of independent schools which more than tripled in number (from 135 to 489 schools) between 2000/01 and 2010/11, whereas the municipal schools showed a modest increase (from 485 to 505 schools) (National Agency for Education, 2008b, 2010c). The growth of independent schools included a rising conversion rate of municipal post-16 schools into for-profit independent schools (National Agency for Education, 2008c). The expansion of new schools was paralleled by a demographic increase in student cohorts until 2008/09, when a peak of

396,000 students was reached. Thereafter, the decline in student cohorts is expected to continue till around 2016 when there will be about 25 percent fewer students (Statistics Sweden, 2009).

In 2010 the independent upper secondary schools constituted almost half of all schools (48%) in the sector and recruited almost a quarter (24%) of the students (National Agency for Education, 2011b). The independent schools are spread all over the country, although they are particularly concentrated in Sweden's three big city regions (Stockholm, Västra Götaland, Malmö) which in 2010/11 had 61 percent of the independent students (National Agency for Education, 2011c).By 2010/11 almost nine out of ten independent upper schools were run in various forms of companies (National Agency for Education, unpublished). Slightly over 85 percent of the schools were owned by limited companies. Less than 9 percent were organised by foundations, and fewer than 4 percent by non-profit organisations.

Four large independent school actors

Who then were the major actors in the independent sector by the end of the decade?

From our sources we identified four limited companies that seemed to dominate in terms of the number of schools and/or students: AcadeMedia AB, John Bauer Organization AB, Kunskapsskolan i Sverige AB, and Baggium Utbildnings AB (Table 1).

Table 1. Number of schools and students of the four dominant independent actors in 2010 and early 2011

Actor	No. of upper secondary schools	No. of students
AcadeMedia AB	Over 70	13,000
John Bauer Organization AB	29	12,500
Baggium Utbildnings AB	50	6,000
Kunskapsskolan i Sverige AB	9	2,500

The main characteristics, including expansion trends of the four large independent school actors, are set out below.

AcadeMedia AB

The largest education company identified in 2010 and early 2011 was by far AcadeMedia AB. In early 2010, AcadeMedia operated about 100 schools via different companies spanning pre-school, compulsory school, upper secondary school and adult education, and involving 2,500 employees and more than 45,000 students. At the upper secondary level AcadeMedia had around 13,000 students in over 70 schools, of which the majority were oriented to academic study paths (AcadeMedia, 2010a). Thus, AcadeMedia reveals impressive growth since 2007/08 when the company had 24 schools and less than 3,800 students at the upper secondary level (Schools Inspectorate, unpublished).

In 2008 AcadeMedia merged with another large education company, Anew Learning AB, to form the "new" AcadeMedia. Prior to the merger, the two companies were rated second and third in size by the national education authorities. The new AcadeMedia then became the largest independent school actor in Sweden, also at the upper secondary level where it overtook the previous leading actor, the John Bauer Organization AB (AcadeMedia, 2008). The AcadeMedia annual report of 2009 reported a raised company value due to the merger and new company structures (AcadeMedia, 2010b). AcadeMedia's then main owner was the Swedish venture capital company,Bure Equity AB. The "new" AcadeMedia reported 20 percent growth in student numbers in the upper secondary sector in both 2008 and 2009.

The expansion of schools and students is taking place according to the "organic" growth of its own schools, the opening of new schools and purchases of other schools. For example, in just the autumn of 2009 AcadeMedia grew in the upper secondary sector by opening 15 new schools and recruiting 2,500 more students. In mid-2011 AcadeMedia ran 12 upper secondary school clusters, each with a specific profile or pedagogical concept (Didaktus, Vittra, IT-gymnasiet, Framtidsgymnasiet, Rytmus, Nordens Teknikerinstitut, Mikael Elias Teoretiska Gymnasium, Drottning Blankas gymnasium, Ljud och Bildskolan, Plusgymnasiet, Pro Civitas Privata Gymnasium, Sjölins) (AcadeMedia, 2011a).

In 2010, the majority of AcadeMedia was sold by Bure Equity to two other venture capital companies after a bidding war characterised in the media as both raffling and bizarre (Svenska Dagbladet, 2010a). The main new owner is EQT V Limited, which took over 80 percent of the shares, and the other is Providence Equity Partners, registered in the USA, which bought 18 percent. EQT V is in turn part of Investor, a large industrial holding company in the Nordic region (Investor, 2011a). The national status of EQT V Limited remains somewhat unclear. According to the EQT V website (no date, a) the company is registered on Guernsey and has offices in many different countries, which is also reported by business media (Fokus, 2010). However, AcadeMedia emphasises on its website that EQT V Limited is a Swedish company (AcadeMedia, no date, b).

For the new owners, which both operate in the international arena, education is however a new business orientation. EQT V has an industrial approach and operates in Northern and Eastern Europe and Asia (EQT V, no date, a). Providence is involved in communication, media and entertainment in different countries (Providence, 2011). According to business commentators, EQT's management defines education as a type of business which is "under development" and where there is "still much to do" (E24, 2010), also abroad (Dagens SPS, 2010; Affärsvärlden, 2009; Dagens industri, 2010a; see also Lärarnas Nyheter, 2010).

In mid-2011 AcadeMedia expanded by acquiring the company Pysslingen Förskolor och Skolor, Sweden's largest private actor in pre-school and lower compulsory education. Pysslingen was founded as a Swedish company, but was previously (in

2009) acquired by a Danish venture capital company, the Polaris Equity (AcadeMedia, 2011b). Following the merger between AcadeMedia and Pysslingen, AcadeMedia now has about 240 schools responsible for 64,000 students. Information on the expansion of AcadeMedia can be found in press releases and elsewhere on the company website which is continuously updated. However, at the time of completion of the study (September, 2011) there was no information on the precise number of upper secondary students.

According to the Swedish daily national newspaper, Svenska Dagbladet (2011), which focused on venture capital interests in the independent school sector, in 2009 the turnover of AcadeMedia was SEK 2,103 million, of which it made a profit of SEK 170 million. While significant gains over the years have also been announced in AcadeMedia's annual reports, the company's message to a wider audience was however that no profits were distributed to the company's shareholders. The management emphasised that the economic surplus from education was used to pay debts, economic rents or make investments in facilities, equipment and staff training (Lärarnas nyheter, 2010).

John Bauer Organization AB

The second largest actor was the John Bauer Organization AB, which in 2010 had about 12,500 students (John Bauer, no date, a) and thereby about 3,000 more students than in 2007/08 (cf. Schools Inspectorate, unpublished). The John Bauer schools started in the southern part of Sweden and are today spread all over the country. The schools are run in line with a franchise concept, which means they are linked to the main owner and have to follow the central concept of John Bauer Organization AB (National Agency for Education, 2004). From the outset John Bauer schools' study path was more restricted and oriented to IT and technology, and had a vocational direction. Today the John Bauer schools offer many national study paths, although an emphasis on vocational study directions may be noted (John Bauer, no date, b).

The company's expansion took place also in the compulsory sector where according to various newspapers it sought authorisation in 2010 for 16 new compulsory schools (Borås Tidning, 2010; Blekinge läns tidning, 2010). Currently, in the autumn of 2011 the John Bauer Organization provides an education to a total of about 16,500 students within different affiliated companies covering compulsory, upper secondary and adult education (John Bauer, 2011a). The John Bauer Organization's expansion has been noticed by business media which in 2008 listed three companies (Drivkraft Värend, Fourfront, Ultra Education) within the organisation among the fastest growing companies in Sweden (Affärsvärlden, 2008). In other media, the company's founder and original owner has been scrutinised and criticised for making profits, parallel to the uncertain qualities of the study paths provided (TV4, 2007a, 2007b).

In late 2008 the main part (90 percent) of the John Bauer was sold to the Danish venture company Axcel for an unknown sum of money. Axcel was previously associated with housing, fashion and pet food and had no previous experience in education (Axcel 2011).

As one of the independent school pioneers, the John Bauer schools were among the first in Sweden to provide a personal laptop to their students, something it still does (John Bauer, 2011 b). The John Bauer pedagogical concept, which has changed over time from "problem-based learning" to "entrepreneurial learning", emphasises the individual's responsibilities for their own learning (Erixon Arreman and Holm, 2011).

It seems that the John Bauer sees great potential for an international expansion in education (Dagens Industri, 2010b). Thus, in 2005 a holding company for educational institutions and projects outside Scandinavia, John Bauer International S.L., was established. According to its website, by the late 2000s the company had also exported its pedagogical concept of entrepreneurial learning by setting up schools in Norway, Spain and China (John Bauer International, no date). The company further announced it was aiming to establish schools in other countries considered to have good economic growth, for example Nepal, Cambodia and India:

> We are therefore now seeing the beginning of strong growth in private education in countries such as India, Nepal and Cambodia in order to cater for the needs of the growing number of students. Thus this trend, which generally started or strengthened around 2000, creates a strong demand for private education. /…/ the entrepreneurial spirit of the people behind John Bauer International, always keen to engage in new projects and to take the organisation further, as well as a genuine desire to make a difference and contribute to the advancement of society through educational development, especially in lesser developed countries, are the very reasons for our existence (John Bauer International, no date).

The international ambitions were further stressed in press releases where the company announces it had been invited by the Ministry of Education in Abu Dhabi (in the United Arab Emirates) to set up schools and introduce a similar system as in Sweden for its independent schools (Ultra Education, 2008).

Baggium Utbildnings AB

Baggium Utbildnings AB had by 2011 expanded to become the third largest actor with about 50 schools and around 6,000 students in apprentice education. Baggium started in the education sphere in 1999 after previous experience of running foster homes and homes for young refugees. The pedagogical concept emphasises the student's individual aims and responsibilities for achieving the goals. The company's expansion all over the country is particularly prominent in the western parts. Its growth has been related to the establishment of new schools and the purchase of other schools, both public and independent (Baggium, no date). According to the regional newspaper Göteborgs-Posten (2010), in 2009 the company had the highest turnover of education companies in the region, with profits of about 15 percent. Baggiums' owner found that the school's success was due to the fact that the then new apprentice study paths were attracting students from many parts of Sweden, meaning that the company received school vouchers from four out of five municipalities (ibid). According to the same source, the company's profits for both 2008 and 2009 amounted to SEK 10 million per year, which were distributed to its two owners.

In spring 2010, 70 percent of the company shares were sold to a Norwegian venture capital company, FSN, for an unknown sum. Göteborgs-posten estimated that the owners had "earned millions" from the transaction. In an examination of the company's finances, Swedish Television (2011a, 2011b) showed that Baggium had received specific government grants of SEK 194 million for a pilot apprentice education programme between 2008 and 2010 on top of the "ordinary" school vouchers, despite the fact that the company had not fulfilled the requirements to provide compulsory in-practice-training for all students. In spring and autumn 2011, various Baggium schools around the country attracted massive criticism from the national education authorities, and new applications for new schools were rejected (Nyhetspressen, 2011).

Kunskapsskolan i Sverige AB

Kunskapsskolan i Sverige AB currently runs 33 schools in Sweden, involving about 10,000 students and 800 employees at compulsory and upper secondary levels. The upper secondary sector has nine schools and about 2,500 students. As clearly indicated by its name ("The Knowledge School") Kunskapsskolan wants to provide "knowledge". Other pedagogical concepts used and announced by the school are individualised learning and personal goals (Kunskapsskolan, no date), whereas the teaching of various subjects is regulated by a centrally decided educational model for teachers to follow (Ståhle, 2006).

The expansion on the upper secondary level in Sweden has mainly been via purchases of schools, while schools at the compulsory level are mainly started and built from "scratch" (Schools Inspectorate, unpubl.). Kunskapsskolan's idea is to make maximal use of large-scale advantages for teaching and premises, and also of opportunities to identify success factors, follow up and assess the schools' work (see Ståhle, 2006). Since 2002 the majority of the company shares (70 percent) have been owned by one of the company's two founders, while 30 percent are owned by Investor AB (Investor, 2011b).

Since the establishment of Kunskapsskolan in the late 1990s the aim has been to become "Sweden's best school" and the "leading actor on the market" (Ståhle, 2006:27). Kunskapsskolan's ambitions in the UK were highlighted in 2004 by the British BBC News. One of Kunskapsskolan's founders has also participated as expert advisor of the British Conservative Party by outlining a system for independent schools and school vouchers similar to "the Swedish model" (Conservative Party, 2007; Skolvärlden, 2010; Svenska Dagbladet, 2010b).

In October 2007, Kunskapsskolan opened an office in London and in 2009 the education company signed an agreement with the British government to open two schools in London in autumn 2010 (Kunskapsskolan 2009). Today, it seems that Kunskapsskolan has adopted more long-term perspectives with regard to its international expansion, although the idea of education becoming a Swedish export industry is still maintained by its owners (Investor, 2011b; Dagens Nyheter, 2009a).

It should also be mentioned that there is an ownership relationship between Kunskapsskolan and AcadeMedia since both are owned, or affiliated through ownership, to the venture capital firm Investor AB. Further, the person who is the major owner of Kunskapsskolan is a public consultant of the large Swedish Wallenberg foundation, which is also affiliated with Investor (Realtid.se 2010).

Summary and conclusions

In this article, the expansion of the Swedish school market in upper secondary education is explored and analysed in relation to policies for the public funding of privately run schools, so-called independent schools. The aims also include identifying the four biggest providers of independent upper secondary education, and new business formations and expansion trends in both the independent upper secondary sector in Sweden and abroad.

In the late 2000s, it was obvious that a highly competitive market situation in the upper secondary sector had been established (National Agency of Education, 2010a). The emergence of a school market was related to a policy shift in the early 1990s from central directives and control of education to the transfer of state responsibilities to the local levels, including new independent actors.

In the last decade the number of schools in the upper secondary sector has almost doubled and the new schools are almost exclusively independent, which means that the independent sector has more than tripled. Today the sector is heavily dominated by for-profit providers. In 2010 more than eight of ten were limited companies (National Agency of Education, unpublished).

To collect data for this study, a variety of official and "non-official" sources were used. The media and company documents provided insights which could not be gained from official authorities or statistics.

The four major independent education providers identified in the study are all large education companies: AcadeMedia AB, John Bauer Organization AB, Baggium Utbildnings AB and Kunskapsskolan in Sverige AB. Although the education providers differ in some aspects, e.g. regarding their geographical location, ownership structures, the delivery of study paths and pedagogical profiles, they were all organised as limited companies.

The study points to great instability in the independent upper secondary sector. In just the last three years, ownership, organisational forms and financial relations have shifted in the three largest companies studied. The number of students has also increased, albeit with great variety between the providers. Whereas the largest actor, AcadeMedia, had a spectacular expansion between 2007 and 2010, from about 3,800 to 13,000 students and from 24 to 70 schools, the growth of Kunskapsskolan at the upper secondary level was modest, with its expansion strategies being directed instead to the compulsory school sector.

At the time of completing this study, the four actors were all connected to larger private venture companies. In 2002, Kunskapsskolan became partly owned by the Swedish venture capital company Investor. More recently, the three other independent actors were taken over by equity companies registered in other countries (John Bauer by Axcel in Denmark; AcadeMedia by EQT V and Providence, in Guernsey and the USA, respectively, and Baggium by FNS in Norway). For the new owners, previously all active in a variety of businesses and industrial sectors outside Sweden, education was then a new investment. For any venture company, education is however a financial activity in line with other businesses (Isaksson, 2006). Further, for the schools being run on a franchise concept (see Dictionary.com, 2011), the right of licence is granted by the main company owner, whereby part of the income (the student voucher) is handed over from each school to the main organisation.

The expansion of independent schools is at first glance primarily related to students' opportunities of choice. The numbers of students opting for independent schools, including the student cohorts in the 2000s, have also steadily grown. In 2010 the independent upper secondary sector recruited about a quarter of the student population in the country. Other studies indicate that students' choice of independent schools relates to a variety of factors, including the excitement of the "new", a specific pedagogical profile, new, different premises and new surroundings (Palme, 2008). In the 2000s independent schools also tended to offer various things for "free" such as a personal laptop, a driving licence, travels abroad and even "school free" Wednesdays (Holm & Erixon Arreman, 2009). Independent schools may also have specific study orientation (for example, music or sciences) which might then attract specific groups of students.

The independent sector's growth should also be understood in relation to the many legal opportunities to exploit a number of cost-reduction strategies. Large-scale concepts, as indicated by the AcadeMedia management and annual reports, may reduce the costs of school materials, computers and administration. However, large-scale advantages can also be used by public schools. A favourable condition for independent schools is that private actors can sign short-term contracts for premises to allow them to adapt more quickly to varying student numbers. Premises represent great expenses for the public sector (cf. Svensson, 2010) that cannot easily be reduced as public schools have specifically constructed premises to comply with various regulations. Since those premises can seldom be used for purposes other than education, the related costs will be constantly high. However, one strategy to avoid high costs for school premises being used by a growing number of municipalities is to convert municipal schools into independent schools (National Agency for Education 2008c).

Moreover, whereas the public schools are obliged to include everyone in the municipality within the student cohorts, including those with functional hindrances and with special needs, the independent actors do not have such responsibilities. Further, according to the policies which were valid until 1 July 2011 the independent schools were not required to provide many activities and services (libraries, health services, school meals, gym halls etc.) which were compulsory for the public schools and could not be avoided. With these services being set aside, the surplus of the student voucher that accrued to the school owners could increase. The independent schools could also reduce costs by hiring staff who were not qualified for study guidance and counselling.

Statistics also suggest that independent actors tend to employ strategies to lower costs by using teachers with lower formal teaching qualifications, and also proportionally fewer teachers (National Agency for Education, 2010b). In this study, the pedagogical concept of three of the four school companies (John Bauer, Baggium and Kunskapsskolan) emphasised the individual student's own responsibility for achieving the individually set goals. This focus on the individual student can also be seen as a cost-reduction strategy (cf. Ståhle, 2006).

The study also reveals that three of the four large independent providers conceive the Swedish policies for independent schools as "exportable" and providing future opportunities in education outside Sweden. For the largest actor, AcadeMedia, education is more widely considered a future "export industry", whereas for Kunskapsskolan more firm steps were taken in collaboration with the British Conservative Party (2007) to introduce the "Swedish model" for independent schools in the UK. For the John Bauer organization, various measures are being taken for expansion in Europe and Asia.

The study further indicates that the four main education companies are all profitable. However, the profits of the companies which have been noticed and discussed in the media, and sometimes in annual reports, have tended to not be recognised by the company owners who have either not wanted to comment on the issue or argued that they did not distribute any profits to the shareholders or owners, and that the profits made were used for improving the schools' equipment or premises or for teachers'further education. Thus, what is highly relevant when it comes to understanding the expansion of independent schools in Sweden is that their owners can freely distribute and use the surplus of the voucher money, unlike the publically administered schools for which any surplus goes back to the public administration (Ministry of Education, 2011).

Therefore, by referring to Ball (2007) we have identified a Swedish *market discourse* in education, which is underpinned by a complex policy system for financing and deregulating education (Govt. bill 1992/93:100). The market discourse includes language and actions, according to Ball (2007) and also to Whitfield (2006). The Swedish policy shift in education can thus be considered a good example of a market discourse which has clearly integrated policy rhetoric (language) and policies (actions) for the promotion of private actors. The policy changes, as Swedish policy-makers suggested, would result in "higher quality" and "efficiency" in education, phrases and words which belong to a frequently recurring market-discourse vocabulary. We can also see that the policy rhetoric was underpinned by affirmatively loaded words which included suggestions about better schools, better teachers, the best education in Europe and also better knowledge in Sweden (Govt. bill 1991/92:95, 1992/93:230).

The suggested needs for reform and the suggested outcomes and improvements are also in line with the market discourse, according to Ball. The new policies were also emphasised as being needed at many levels, including the local (students, teachers), the national (Sweden as a knowledge nation) and the global (Europe) (Statement of Govt., 1991). Here, we can again draw on Ball who maintains that the market discourse is strengthened by its emphasis on the individual, the nation-state, and the nation's competitiveness in the international arena. By reference to Whitfield (2006) we can say that the business transformations in the upper secondary sector, reflect typical features of the interrelations between privatisation and marketisation. We can also see that upper secondary education has come to represent a new market in which school companies and public schools, including housing, are being sold. The study also discerns "structural couplings" between policy-makers and business interests, as mentioned by both Ball and Whitfield, and which we found in the study were most clearly represented by Kunskapsskolan and John Bauer, both active policy-makers for independent schools inside and outside Sweden.

Moreover, the policy idea to introduce new systems for competition (including school choice, the voucher system, and school profiling) was meant to transfer education from the public to the private sector (Govt bill 1992/93:100). These strategies are also recognised by Whitfield (2006) who points out the use of competition, choice and commercialisation for moving education and other public services, as well as public goods, "out of" the public sector.

Finally, this study points to the dramatic growth of for-profit independent schools in the 2000s, a trend which seems unstoppable (National Agency for Education, 2010a). Thus, Swedish upper secondary education has clearly become what Ball (2007: 67) calls an "edu-business", that is to serve the interests of big business as well as education. However, as education is central to each nation particularly with today's emphasis on the importance of "knowledge production"- evidence of grade inflation (Wikström & Wikström, 2005; Henrekson & Vlachos, 2009), and a lower percentage of qualified teachers in the independent sector (National Agency for Education, 2010b, 2010c) should be seen as warning signals for what is to come. A question which thus remains for decision-makers is what the independent schools can do for their students and their country, rather than what they can do for themselves (see also Vlachos, 2011).

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Endnotes

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[2] After this study was completed, a new Education Act came into force on 1 July 2011. National Agency for Education, 2011b. http://www.skolverket.se/lagar_och_regler/2.3351/2.2253

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