

Profiling British Columbia Offshore Schools in 2025/26: A Longitudinal Comparative Analysis of Inspection Reports

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ABSTRACT

The problem and the aim of the study. British Columbia (BC) offshore schools deliver the BC provincial curriculum in international contexts under the oversight of the BC Ministry of Education and Child Care. While a recent thematic content analysis of 2024 inspection reports established baseline characteristics for the program (Marković & López-Carratalá, 2025), no longitudinal evidence has been available to determine whether structural patterns are stable, intensifying, or shifting over time. This study aims to examine year-over-year change across the BC offshore school network by replicating the 2024 coding framework on the 2025/26 cohort of inspection reports.

Research methods. The study employed a qualitative content analysis of 34 inspection reports released by the BC Ministry of Education and Child Care during the 2025/26 inspection cycle. Reports were coded against the same predefined subthemes used by Marković and López-Carratalá (2025) — School ID, Country/Region, Total Enrolment, Grade Levels, Curriculum Implementation, Governance Structure, Staffing and Teacher Certification, Operational Challenges, Enrolment Trends, and Other Key Observations. The 2025/26 results were then systematically compared to the 2024 dataset to identify directional change.

Results. The 2025/26 cohort contains three fewer schools in China ($n = 20$, down from 23) and the appearance of Colombia as a new host country, while all other countries from the 2024 cohort remain represented. China's aggregate BC program enrolment declined from 2,867 to 2,542 students, and the largest individual China school decreased from 347 to 296 students. China's full compliance rate held essentially steady (80%, $n = 16/20$). Operator concentration intensified: three operator groups now control 70% of China's BC offshore schools, up from "more than half" in 2024. Reliance on Letters of Exemption remains widespread (68% of all schools, $n = 23/34$), and turnover continues to disrupt instructional continuity in some sites while other sites report substantial workforce stability. Outside China, the larger-scale schools in the Gulf and Egypt continued growing, while curriculum-engagement features such as project-based and inquiry-based learning were reported nearly twice as often in non-China schools as in China schools.

Conclusion. The 2025/26 inspection cycle indicates that the BC offshore school program in China is contracting in absolute size while consolidating in ownership, even as compliance rates remain stable. The two regional cohorts — China and the rest of the network — are diverging rather than converging in scale, governance form, and curricular emphasis. The persistence of the Letters of Exemption pattern across two consecutive years confirms that teacher certification remains the program's most durable structural challenge. Recommendations for the BC Ministry of Education and Child Care include re-examining the certification pipeline, monitoring operator concentration as a quality assurance variable, and providing differentiated support for the small Chinese schools that now operate near minimum viable enrolment thresholds.

Keywords: BC offshore schools, transnational education, longitudinal analysis, inspection reports, curriculum export, teacher certification, qualitative content analysis.

INTRODUCTION

The British Columbia Offshore School Program is one of the most distinctive arrangements in transnational K–12 education. Since 1998, the Government of British Columbia has authorized private schools located outside Canada to deliver the BC provincial curriculum and to graduate students with the Dogwood Diploma, the same credential issued to graduates of public secondary schools within the province (Government of British Columbia, 2025). The program now spans approximately three dozen schools in 12 to 13 host countries, with the highest concentration in China. It functions simultaneously as an instrument of educational policy, an extension of provincial accountability, and a commercial product, with each certified school paying licensing fees, per-student fees, and the full cost of inspection (Auditor General of British Columbia, 2020).

The empirical literature on the program has been comparatively thin. Existing studies have addressed its early development (Schuetze, 2008; Cosco, 2011), policy framing and branding (Alexander & Werbitsky, 2024; Wang, 2017), teacher experiences and moral tensions (Smith, 2023; Xu, 2024), neoliberal critiques of provincial export education (Lin, 2023), and the localized challenges of Indigenous content delivery in offshore contexts (Adams, 2025). Most of these studies are qualitative, single-site, or document-based, and few engage directly with the systematic dataset that the BC Ministry's annual inspection reports represent.

Marković and López-Carratalá (2025) recently addressed this gap with a thematic content analysis of 37 inspection reports issued in 2024, the first study to use the inspection corpus as a comparative dataset. Their analysis profiled enrolment patterns, governance structures, staffing configurations, curriculum implementation, and operational challenges, drawing a sharp contrast between the smaller, host-school-embedded schools of China and the larger, more independent schools of the Gulf, Egypt, and Bermuda. The authors observed approximately 80% full or near-full compliance among China-based schools, identified Letters of Exemption (LOEs) as a persistent staffing concern, and called for longitudinal research that could track institutional development over time.

The present study takes up that call directly. It applies the same coding framework used by Marković and López-Carratalá (2025) to the 34 inspection reports released by the BC Ministry of Education and Child Care during the 2025/26 inspection cycle, then compares the resulting profile against the 2024 dataset. The aim is to determine which structural characteristics of the program are stable, which are intensifying, and which are changing direction. The contribution is therefore not a replication but an extension: the first year-over-year comparative analysis of the BC Offshore School Program using its own primary regulatory output.

Research Aims and Questions

Adopting the framing established by Marković and López-Carratalá (2025) and extending it longitudinally, this study addresses three research questions:

1. Which structural and operational characteristics of BC-certified offshore schools remained stable between the 2024 and 2025/26 inspection cycles, and which shifted?
2. How have enrolment, grade-level configuration, and staffing patterns evolved year over year, and how do these trajectories differ between China and the rest of the network?
3. What does the 2025/26 evidence suggest about the durability of the structural challenges identified in the 2024 analysis, particularly with respect to teacher certification, host-school dependency, and operator concentration?

BACKGROUND AND CONCEPTUAL FRAMEWORK

BC Offshore Schools as Transnational Education

Transnational education (TNE) refers to the cross-border delivery of education services in which the curriculum, the credential, or the institutional accreditation originates from one jurisdiction but the teaching

takes place in another (Altbach & Knight, 2007). The BC Offshore School Program is structurally distinct from most TNE arrangements. Rather than a higher education institution exporting its programs, a sub-national public authority — the BC Ministry of Education and Child Care — exports an entire provincial K–12 curriculum into private schools that operate under host-country regulation while remaining accountable to BC standards (Parkes & Han, 2015; Wang, 2017).

This dual accountability creates persistent tensions. Schools must simultaneously satisfy BC Ministry requirements for curriculum implementation, teacher certification, and assessment, and the regulatory expectations of host governments, which frequently include enrolment caps, language-of-instruction rules, ideological-content requirements, and operational licensing constraints (Auditor General of British Columbia, 2020; Smith, 2023). The 2024 introduction of China's Patriotic Education Law, which requires educational resources in all schools operating in China to reflect Chinese history, ideology, and national symbols, has added a further layer of regulatory pressure on schools delivering Western-style curricula (ISC Research, 2024).

Quality Assurance Through Inspection

The BC Ministry's quality assurance mechanism is an annual inspection that produces a standardized written report. Each report evaluates a school against a fixed catalogue of requirements grouped under Program Overview, Program Administration, and Program Effectiveness, and assigns each requirement a status of Met, Partially Met, or Not Met (Government of British Columbia, 2025). The reports incorporate document audits, classroom observations, and stakeholder interviews, and conclude with a summative recommendation regarding continued certification. Although the Auditor General of British Columbia (2020) found that ministry oversight was generally effective, the same review identified gaps in business and financial information that limit the ministry's ability to assess long-term sustainability — a gap of particular relevance to questions of operator concentration and enrolment volatility.

Inspection reports thus function as a public accountability artifact and, simultaneously, as a comparative dataset. Because the format is consistent across schools and across years, a thematic content analysis can be applied diachronically as well as cross-sectionally. This is the methodological opening that the present study uses to extend the Marković and López-Carratalá (2025) analysis into a longitudinal frame.

The 2024 Baseline

The 2024 analysis established several profile characteristics that this study uses as comparison points. Among the most consequential were: (a) approximately 80% full or near-full compliance for China-based schools; (b) a heavy structural reliance on Letters of Exemption, with up to 30% of staff at some schools holding LOEs and as many as 27 new teachers hired in a single year at one school; (c) an enrolment range of 9 to 347 in China and a sharp scale contrast with the schools in Egypt, Bahrain, and Qatar, several of which exceeded 700 students; (d) widespread integration of the First Peoples Principles of Learning (FPPL) at the level of mention, but uneven depth of implementation; and (e) an Owner/Operator governance model that the authors described as containing more than half of China's schools within larger education group structures (Marković & López-Carratalá, 2025).

MATERIALS AND METHODS

Research Design

This study employs qualitative content analysis (Krippendorff, 2019; Mayring, 2014) to extract structured data from a corpus of regulatory documents and to compare findings against a prior analysis of the same document type. The design is therefore both replicative — in that the coding sheet is preserved without alteration — and longitudinal, in that the unit of analysis is the change between two annual inspection cycles.

Data Collection

Data for this study consists of 34 inspection reports released by the BC Ministry of Education and Child Care during the 2025/26 inspection cycle, covering inspections conducted between October and December 2025. The reports represent BC offshore schools in 13 countries: 20 in China, 3 in Japan, 2 in Egypt, and one each in Bahrain, Bangladesh, Bermuda, Colombia, France, Kazakhstan, Qatar, Taiwan, and Thailand. The 2024 dataset analyzed by Marković and López-Carratalá (2025) contained 37 reports, with 23 schools in China and 14 across 11 other countries.

The differences between the two cohorts are themselves a finding. The reduction in China-based schools from 23 to 20 represents either a decline in the number of certified schools or an artifact of the inspection schedule, since not every school is inspected every year. Colombia appears in the 2025/26 cohort but was not in the 2024 cohort. All other countries that were present in 2024 remain represented in 2025/26.

Following the convention of Marković and López-Carratalá (2025), individual schools are referred to throughout this paper using anonymized country-based identifiers (BC China_01 through BC China_20, BC Bahrain, BC Bangladesh, BC Bermuda, BC Colombia, BC Egypt_01 and BC Egypt_02, BC France, BC Japan_01 through BC Japan_03, BC Kazakhstan, BC Qatar, BC Taiwan, and BC Thailand). China codes are assigned alphabetically by school name within the 2025/26 cohort and do not correspond to the codes used in the 2024 paper. Operator names are not reported.

Data Extraction and Coding

Each report was read in full and coded against the same predefined subthemes used by Marković and López-Carratalá (2025): School ID, Country/Region, Total Enrolment, Grade Levels, Curriculum Implementation, Governance Structure, Staffing and Teacher Certification, Operational Challenges, Enrolment Trends, and Other Key Observations.

To support comparative analysis, several additional sub-fields were coded with explicit numeric or binary values where the source report stated them: number of teachers under Letters of Exemption, presence of dual-diploma programs, mention of First Peoples Principles of Learning, mention of Big Ideas and Core Competencies, presence of host-school co-location, presence of a Continuous Improvement or School Improvement Plan, mention of mental health or wellbeing initiatives, mention of technology platforms, and the count of formal Commendations.

A strict evidentiary rule was applied throughout coding: a value was only recorded when the source report stated it explicitly. Where reports used hedged or imprecise language (e.g., "about 20 teachers have Letters of Exemption"), the field was left blank rather than approximated. This rule was applied uniformly and is central to the integrity of the dataset.

Data Analysis

Data were analyzed in two stages. First, the 2025/26 cohort was profiled using descriptive statistics and frequency counts within the China and non-China subgroups, replicating the analytic approach of Marković and López-Carratalá (2025). Second, the resulting profile was compared point-for-point against the corresponding 2024 figures, identifying directional change in each subtheme. Where the 2024 paper reported a precise figure, change is described as a numeric delta; where the 2024 paper reported a qualitative descriptor (e.g., "more than half"), change is described in those same qualitative terms with the 2025/26 specific figure provided.

LIMITATIONS

Three limitations of this analysis should be noted at the outset. First, the inspection reports vary in narrative detail; some schools generate longer and more discursive reports than others, and the absence of a particular feature in a report does not always mean the feature is absent in practice.

Second, the two-cohort comparison cannot establish trend direction with statistical confidence; two data points define a slope but not a curve, and the apparent year-over-year shifts identified in this study should be read as preliminary signals to be tested against future inspection cycles. Third, schools are not necessarily inspected in consecutive years, so the 2024 and 2025/26 cohorts are not perfectly overlapping samples; some change is therefore attributable to sample composition rather than to genuine year-over-year movement at the school level.

RESULTS

Results are organized under the seven thematic headings used in the 2024 analysis and are presented as longitudinal comparisons wherever the 2024 paper provides a corresponding figure or descriptor.

School Demographics, Enrolment, and Trends

The 2025/26 cohort comprises 34 inspection reports across 13 countries. Total BC program enrolment across all 34 schools is 7,073 students. Of this total, 2,542 students attend the 20 schools in China and 4,531 students attend the 14 schools in other countries. The same totals in 2024, as reported by Marković and López-Carratalá (2025), were 2,867 students across 23 China schools and approximately 3,866 across 14 non-China schools.

Three patterns emerge. First, China's BC program has contracted in absolute size: aggregate enrolment fell by 11.3% (from 2,867 to 2,542) and the network shed three schools. Per-school average enrolment in China is essentially unchanged (≈ 125 in 2024 vs. 127 in 2025/26), so the contraction is in count rather than scale per site. Second, the upper end of the China distribution has compressed: the largest single China school in the 2024 cohort enrolled 347 students; in 2025/26 the largest enrolls 296. Third, the non-China sector continues to grow at the upper end. BC Bahrain rose from 879 to 953, BC Qatar from 766 to 813, BC Egypt_02 from approximately 1,011 to 913 (a partial decline), and BC Bermuda from 725 to 660. Net non-China enrolment grew from approximately 3,866 to 4,531 — an increase of 17.2%.

Table 1 summarizes the 2025/26 cohort by school. The grade-level pattern is sharper in 2025/26 than in 2024: every China school in the 2025/26 cohort offers exclusively secondary grades (10–12), while 8 of 14 non-China schools offer K–12, 1–12, or 7–12 programs. In 2024, a small number of China schools offered programs extending below Grade 10; in 2025/26, none does.

Among the 34 schools, only seven reports included an explicit description of an enrolment trend: four China schools reported growth, and three non-China schools (in Bahrain, Colombia, and Taiwan) reported the same. No school explicitly reported a declining trend, although several China school reports describe specific cohort or admission challenges in narrative form without using a directional term.

Table 1. *BC Offshore Schools in 2025/26: Enrolment and Grade Levels*

Code	Country	Enrolment	Grade Levels
BC China_01	China	24	10–12
BC China_02	China	55	10–12
BC China_03	China	15	10–11
BC China_04	China	187	10–12
BC China_05	China	48	10–12
BC China_06	China	70	10–12
BC China_07	China	133	10–12
BC China_08	China	141	10–12
BC China_09	China	50	10–12
BC China_10	China	106	10–12
BC China_11	China	127	10–12

BC China_12	China	56	10–12
BC China_13	China	135	10–12
BC China_14	China	38	10–12
BC China_15	China	74	10–12
BC China_16	China	219	10–12
BC China_17	China	288	10–12
BC China_18	China	232	10–12
BC China_19	China	248	10–12
BC China_20	China	296	10–12
BC Bahrain	Bahrain	953	1–11
BC Bangladesh	Bangladesh	18	K–3
BC Bermuda	Bermuda	660	K–12
BC Colombia	Colombia	202	10–12
BC Egypt_01	Egypt	298	1–12
BC Egypt_02	Egypt	913	1–12
BC France	France	113	1–12
BC Japan_01	Japan	272	7–12
BC Japan_02	Japan	13	10–11
BC Japan_03	Japan	55	10–12
BC Kazakhstan	Kazakhstan	110	10–12
BC Qatar	Qatar	813	1–12
BC Taiwan	Taiwan	79	10–12
BC Thailand	Thailand	32	10–12

Compliance Outcomes

Compliance outcomes in 2025/26 closely match the 2024 baseline. Of the 20 China schools, 16 (80%) achieved full compliance — defined here as zero requirements rated Partially Met and zero rated Not Met. This figure is identical to the approximately 80% full or near-full compliance reported by Marković and López-Carratalá (2025) for China in 2024. Among non-China schools, 10 of 14 (71%) achieved full compliance. Across the full cohort, 26 of 34 schools (76%) were in full compliance.

Four China schools received at least one Partially Met rating, and four non-China schools did the same (one in Bangladesh, two in Japan, and one in Thailand). Two schools received a Not Met rating in at least one area: one school in China and the school in Bangladesh. One China school received a conditional summative recommendation, contingent on satisfying the Executive Director of the Specialized Education Programs Branch with respect to outstanding requirements. The 2024 paper did not report comparable conditional-recommendation counts, but the persistence of partial-compliance patterns at four China schools is consistent with the 2024 finding that a small subset of schools persistently struggle with specific requirements while the majority meet all of them.

Table 2 provides a side-by-side comparison of compliance outcomes between the two cycles.

Table 2. *Compliance Outcomes: 2024 vs. 2025/26*

Indicator	2024	2025/26
China full compliance rate	≈80%	80% (16/20)
Non-China full compliance rate	Not reported as a single figure	71% (10/14)
Overall full compliance rate	Not reported as a single figure	76% (26/34)

Schools with ≥ 1 Not Met rating	Reported in narrative; precise count not stated	2
Conditional summative recommendation	Not reported	1 (China)

Governance Structures

Governance patterns reveal the most pronounced longitudinal change in the dataset. Marković and López-Carratalá (2025) reported that in 2024, more than half of China's schools belonged to larger education groups. The 2025/26 cohort indicates that this concentration has intensified. Three operator groups together control 14 of the 20 China schools (70%): one group operates seven schools, a second operates four, and a third operates three. The remaining six China schools are operated by independent owners or by host-school-affiliated organizations.

None of the 20 China schools in the 2025/26 cohort operate under a Board of Directors or Board of Governors model. By contrast, 5 of the 14 non-China schools (36%) do. The structural divide between an Owner/Operator-only model in China and a partial Board model elsewhere is therefore preserved from 2024 to 2025/26 and, in some respects, sharpened.

Staffing and Teacher Certification

The 2024 paper identified Letters of Exemption (LOEs) as the most persistent structural challenge in the program, with up to 30% of staff at some schools holding LOEs and one school hiring as many as 27 new teachers in a single year. The 2025/26 data confirms that this pattern is durable rather than transient. Twelve of the 20 China schools (60%) and 11 of the 14 non-China schools (79%) report at least one teacher holding a Letter of Exemption. Across the full cohort, 23 of 34 schools (68%) have LOE teachers in their establishment.

Where reports include explicit numeric counts, the highest LOE counts in the 2025/26 cycle are 21 (BC Bahrain) and 12 (BC Qatar). One non-China school reports approximately 20 teachers under LOE, but the report uses the imprecise phrase "about 20" and the figure is therefore not coded as a definite number. BC Egypt_01 reports 4 teachers under LOE.

Turnover patterns in 2025/26 differ from the 2024 framing in an important way. Marković and López-Carratalá (2025) cited one school that had hired 27 new teachers in 2024 as evidence of severe instability. The 2025/26 cohort, by contrast, contains a school in China whose inspection report describes it as a retention success: only four of its 23 teachers are new to the school in 2025/26, with an average length of stay of approximately 4–5 years. This is a meaningful counterexample to the 2024 narrative and indicates that a portion of the China network has stabilized its workforce, even as LOE-driven instability persists elsewhere. The 2025/26 evidence supports the broader 2024 conclusion — that staffing remains the program's most durable structural problem — while complicating the assumption that all sites are equally affected.

The Auditor General of British Columbia (2020) found that only one-third of LOE holders ultimately achieve full BC certification, and that many leave before the end of their contracts. Two consecutive years of high LOE prevalence in the 2024 and 2025/26 inspection corpora reinforce that finding and suggest that the certification pipeline has not materially improved over the intervening cycle.

Curriculum Implementation

Curriculum fidelity remains high across both cohorts. The First Peoples Principles of Learning (FPPL) is mentioned in 100% of 2025/26 inspection reports ($n = 34/34$), as it was in essentially all 2024 reports. Big Ideas are referenced in 17 of 20 China reports (85%) and 13 of 14 non-China reports (93%). Core Competencies are referenced in 18 of 20 China reports (90%) and 14 of 14 non-China reports (100%). These are surface-level indicators — they record whether the construct is named in the report, not whether it is implemented with depth — but the consistency of the figures across regions and across years suggests that the technical machinery of BC curriculum delivery is well established at the network level.

Two indicators of pedagogical depth show a regional asymmetry. Project-based learning is mentioned in 5 of 20 China reports (25%) and 8 of 14 non-China reports (57%). Inquiry-based learning is mentioned in 3 of 20 China reports (15%) and 5 of 14 non-China reports (36%). The 2024 paper did not quantify these constructs separately, so direct year-over-year comparison is not possible; what the 2025/26 evidence does establish is that approaches consistent with the BC redesigned curriculum's emphasis on competency development are reported nearly twice as often outside China as within it.

Dual-diploma programs are rarer in 2025/26 than the 2024 paper might suggest. Marković and López-Carratalá (2025) described dual-diploma models as "standard" outside China and as occasionally present in China. The 2025/26 data identifies only three dual-diploma schools across the entire 34-school cohort: one in China and two in Japan. The 2024 description may reflect a broader interpretation of "dual-diploma" or a different sample composition; on the strict criterion that a report explicitly identifies a dual-diploma structure, the 2025/26 prevalence is approximately 9% ($n = 3/34$).

Only one school in 2025/26 received a Partially Met rating specifically on Section 3.02 (curriculum implementation): a school in China. Across the rest of the network, curriculum implementation requirements are universally Met.

Operational Features

Three operational patterns from 2024 persist or sharpen in 2025/26. First, the host-school model continues to dominate in China and remains uncommon elsewhere: 19 of 20 China schools (95%) operate within or alongside a host school, compared with 4 of 14 (29%) non-China schools. Second, technology integration shows the sharpest regional gap in the entire dataset. Reports for all 14 non-China schools (100%) explicitly mention digital instructional platforms, learning management systems, or technology integration practices, while only 11 of 20 China school reports (55%) do so. The 2024 paper observed that inconsistent internet connectivity remained a barrier to digital integration in some China schools (Marković & López-Carratalá, 2025); the 2025/26 data quantifies that observation.

Third, parent communication patterns differ markedly between regions. Inspection reports for 17 of 20 China schools (85%) explicitly mention WeChat or other parent communication systems, compared with 6 of 14 non-China schools (43%). This likely reflects the centrality of WeChat in Chinese family life rather than a difference in actual engagement; nonetheless, it is a feature consistently captured in inspection reports.

Continuous Improvement Plans (CIPs) or School Improvement Plans (SIPs) are reported by 15 of 20 China schools (75%) and 8 of 14 non-China schools (57%). Mental health and wellbeing initiatives are mentioned at similar rates in both regions (60% China, 57% non-China). Post-secondary pathways are mentioned in 19 of 20 China reports (95%) and 13 of 14 non-China reports (93%), reflecting that the BC offshore program functions, in part, as a feeder to international post-secondary education.

Commendations

Each inspection report concludes with a Commendations section in which the inspection team recognizes specific practices, programs, or staff. The number of distinct commendations issued per school provides a rough proxy for the inspection team's positive evaluation of the school. China schools received a mean of 11.3 commendations per report (range 5–21); non-China schools received a mean of 14.7 (range 7–25). Across the 2025/26 cohort, the highest commendation counts were observed in non-China schools and in the most established China schools.

Table 3. *Longitudinal Comparison: Selected Indicators, 2024 vs. 2025/26*

Indicator	2024	2025/26	Direction
Total schools (n)	37	34	↓ 3

China schools (n)	23	20	↓ 3
Non-China schools (n)	14	14	—
Host countries (n)	12	13	↑ 1 (Colombia)
China total enrolment	2,867	2,542	↓ 11.3%
Largest China school enrolment	347	296	↓ 14.7%
BC Bahrain enrolment	879	953	↑
BC Qatar enrolment	766	813	↑
BC Bermuda enrolment	725	660	↓
BC Egypt_02 enrolment	≈1,011	913	↓
China full compliance rate	≈80%	80%	Stable
FPPL mention rate	≈100%	100%	Stable
China LOE prevalence	Widespread; up to 30% of staff at some schools	60% of schools (12/20)	Persistent
Non-China LOE prevalence	Reported in Bahrain, Qatar, France, Bermuda	79% of schools (11/14)	Persistent
China operator concentration (top 3 groups)	"More than half"	70% (14/20)	Intensified
China host-school model	Dominant	95% (19/20)	Persistent
Dual-diploma programs (network)	Described as standard outside China	9% (3/34) — 1 China, 2 Japan	Less prevalent than implied
Tech integration mention (China)	"Inconsistent"	55% (11/20)	Persistent gap
Tech integration mention (non-China)	"Widely integrated"	100% (14/14)	Stable

DISCUSSION

Three interlocking findings define the 2025/26 inspection cycle. Each can be read against the 2024 baseline as evidence of a stable, intensifying, or shifting pattern, and each carries policy implications for the BC Ministry of Education and Child Care, host-country regulators, and program operators.

China: Contracting Footprint, Concentrating Ownership

The most consequential finding is that China's BC offshore school footprint is contracting in absolute size while the ownership structure beneath that footprint is consolidating. The total number of certified China schools in the 2025/26 inspection cohort is three lower than in 2024, aggregate enrolment has declined by more than 11%, and the largest single China school has decreased in size by approximately 15%. Simultaneously, three operator groups now control 70% of the China network, up from "more than half" in 2024.

Two structural pressures plausibly drive these patterns. The first is regulatory: China's Patriotic Education Law, which came into force on 1 January 2024, requires that educational resources in all schools operating in China reflect Chinese history, ideology, and national symbols (ISC Research, 2024). For schools whose appeal rests on the delivery of a Western-style competency-based curriculum, this is a material operating constraint. The second is demographic and competitive: ISC Research (2024) reports that international school enrolment growth in China has slowed to approximately 3% since 2019, well below regional comparators, while affluent Chinese families increasingly seek international schooling experiences in neighboring jurisdictions, particularly Japan.

Operator concentration has its own quality assurance implications. As the Auditor General of British Columbia (2020) noted, the ministry's certification process does not require detailed business or financial information from operators, and there is no mechanism for evaluating concentration risk at the network level. If a single

operator controlling seven schools were to encounter financial distress, change strategic direction, or lose a host-government licence, the impact would propagate across multiple sites simultaneously. The current trajectory makes this a more salient consideration in 2025/26 than it was in 2024.

Letters of Exemption: A Durable Structural Challenge

The 2025/26 evidence confirms that reliance on Letters of Exemption is not a transient feature of the program but a structural one. Two consecutive inspection cycles show widespread LOE prevalence — present in 68% of 2025/26 schools — and the highest LOE counts in the 2025/26 cycle are similar in scale to the highest counts implied by the 2024 narrative. The Auditor General of British Columbia (2020) found that only one-third of LOE holders ultimately achieve full BC certification; if that conversion rate has not improved, then the program is operating with a chronic certification deficit rather than a one-time transition gap.

The 2025/26 cohort also yields an important counterexample to the prevailing turnover narrative. As noted in the Results section, one school in China reports that only four of its 23 teachers are new to the school, with average tenure of 4–5 years. This indicates that workforce stability is achievable within the China network, given the right combination of operator support, working conditions, and leadership continuity. Identifying which conditions distinguish the stable schools from the high-turnover ones — a question the inspection corpus alone cannot fully answer — would be a productive direction for follow-up qualitative work.

Divergence Rather Than Convergence Between Regions

Marković and López-Carratalá (2025) framed their analysis as a profile of regional variation. The 2025/26 evidence indicates that the regional patterns they described are not converging over time; in several dimensions, they are diverging. China's network is contracting while the Gulf and Egyptian networks continue to grow at the upper end. China's schools remain entirely secondary while non-China schools increasingly include K–12 or extended-grade programs. China's reports show technology integration in 55% of cases versus 100% non-China. Project-based and inquiry-based pedagogies are reported nearly twice as often outside China.

This divergence has implications for how the program is governed at the ministry level. A single set of standards applied to schools that vary by an order of magnitude in enrolment, that operate under fundamentally different host-country regulatory regimes, and that draw on different pools of certified labour will produce uneven results. The 2025/26 data suggests the BC Ministry may need to consider differentiated support structures: for the small (15–50 student) China schools that operate near minimum viable enrolment thresholds, capacity-building support and pathway clarity matter most; for the large (700+) Gulf and Egyptian schools, the questions are about scaling quality assurance and ensuring that the BC standards remain meaningfully present at the level of classroom practice in institutions where BC-certified teachers are a minority of the teaching force.

Curriculum Fidelity and the Indigenous Content Question

FPPL is mentioned in every 2025/26 inspection report. This is consistent with the 2024 finding and with the BC Ministry's expectation that all certified schools integrate the First Peoples Principles of Learning across the curriculum (First Nations Education Steering Committee [FNESC], n.d.). However, mention of FPPL is not equivalent to substantive integration. Adams (2025) found that meaningful FPPL implementation in offshore contexts depends on teacher preparation, institutional commitment, and the availability of culturally appropriate authentic resources — none of which the inspection report format directly evaluates. The combination of universal mention and uneven implementation that Adams describes is consistent with what this study can observe through the inspection corpus: the construct appears in every report, but the inspection process is not designed to evaluate depth.

The question of how Indigenous content from a specific Canadian context is meaningfully integrated in classrooms across host countries is one that future BC policy work will need to engage directly. The 2023/24 introduction of an Indigenous-focused graduation requirement (Government of British Columbia, 2025) raises

the substantive stakes of this question, since offshore students must now complete at least four credits of Indigenous-focused coursework to satisfy graduation requirements. The inspection corpus does not currently provide a means to evaluate whether this requirement is being met substantively or pro forma.

CONCLUSION

This study has applied the coding framework developed by Marković and López-Carratalá (2025) to the 34 BC offshore school inspection reports released in the 2025/26 cycle, and has compared the resulting profile against the 2024 baseline. The longitudinal comparison yields a coherent set of findings. The China network is contracting in absolute size while consolidating in ownership; the structural reliance on Letters of Exemption is durable rather than transient; the regional divide between China and the rest of the network is sharpening rather than narrowing; and curriculum fidelity at the level of formal mention remains universally high while the depth of pedagogical practice varies in patterned ways across regions.

These findings carry three implications for the BC Ministry of Education and Child Care. First, the certification pipeline for international teachers warrants direct attention; two consecutive inspection cycles showing widespread LOE prevalence indicate that the current pipeline is not converting LOE holders to fully certified teachers at a rate sufficient to meet network demand. Second, operator concentration in the China network is now sufficient to constitute a quality assurance variable in its own right, and the Auditor General's 2020 recommendation that the ministry collect more substantive business and financial information from operators is more relevant in 2025/26 than it was when issued. Third, the small Chinese schools operating with enrolments under 50 — and there are several — are operating at a scale that approaches the minimum threshold for viable program delivery, and they may require a differentiated support strategy that recognizes the difference between a 15-student school and a 953-student school.

Two limitations bound the strength of these conclusions. The first is that two annual data points define a slope but not a curve; the directional shifts identified here will be more credible after a third or fourth comparable cohort. The second is that the inspection corpus, however systematic, captures only what the inspection process is designed to evaluate. It does not capture classroom practice as experienced by students, the lived working conditions of teachers, or the perceptions of host-country families. Triangulating the inspection corpus with interview-based, ethnographic, or survey research, as Marković and López-Carratalá (2025) recommended, remains the most important methodological extension for this line of inquiry.

What this study contributes, on the strength of the inspection corpus alone, is the first longitudinal evidence base for the BC Offshore School Program. The 2024 profile is not a snapshot of a steady state; it is a snapshot of a system in motion. The 2025/26 evidence indicates the direction of that motion. The next inspection cycle will indicate whether that direction holds.

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