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To cite this article: Hyejin Kim & Erik Mobernd (2019): Stealth marketisation: how international school policy is quietly challenging education systems in Asia, *Globalisation, Societies and Education*, DOI: [10.1080/14767724.2019.1571405](https://doi.org/10.1080/14767724.2019.1571405)

To link to this article: <https://doi.org/10.1080/14767724.2019.1571405>



Published online: 25 Jan 2019.



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Stealth marketisation: how international school policy is quietly challenging education systems in Asia

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ABSTRACT

Across Asia, the international school scene has experienced marketisation and corporatisation. A consequence is that many wealthier families – outside of expatriate communities – view international schools as a desirable choice, and they seek ways to enrol their children in international schools. States have responded to this situation through policies that manage the boundaries between public or national school systems and international schools. States have made compromises in their international school policies – compromises that allow markets to creep into the broader education systems. This mode of market creation is subtle: Neither families nor state agents advocate for ‘choice’ as a value, nor are there public discourses around international schools in the region celebrating ‘choice’ in education. The compromises made in international school policy relate to whole education systems and have implications for inequality, citizenship, and national identity.

ARTICLE HISTORY

Received 15 October 2018
Accepted 12 January 2019

KEYWORDS

International schools; education policy; global education industry; marketisation; global policy networks; East and Southeast Asia

Introduction

Governments in East and Southeast Asia have recently made a flurry of policies regarding international schools. This policymaking activity is remarkable because education ministries have traditionally given scant attention to these schools. Serving the primary and secondary school children of expatriate families, schools that self-identify as ‘international’ have usually been on the margins of education systems. Far from the concerns of most citizens and educating only a fraction of any population, international schools are not the likeliest object of interest for education authorities. Nonetheless, in the past several years, international schools have gained new attention from policymakers in Asia. In the booming economies of Vietnam and China, regulators have written and re-written laws on international schools. Democratic governments in Indonesia and South Korea have struggled to balance a desire to become international with a need to impose limits on admission criteria in international schools. Countries such as Singapore and Cambodia have introduced schemes to provide – and in some cases, limit – international school operators’ access to land.

Many operators of international schools are not single school houses but corporate entities with branches in multiple countries (Kim 2016a). These firms inhabit the global education industry. As research in this emerging field indicates, private and public actors in education have become woven together on a global scale (Gulson and Lubienski 2014). Education policy today is entangled in this ‘heterarchical’ web (Olmedo 2014). Studies of the global education industry provide an apt starting point for thinking about international school policy. This expanding policy area, though, sheds light on a face of the global education industry that has received less attention. Verger, Steiner-Khamsi,

and Lubienski (2017) helpfully identify three forms of the global education industry. These are neo-liberal reforms, the globalisation of standards, and the propagation of for-profit of schools in lower-income societies. International school policies are not made as part of a programmatic restructuring of education systems around 'school choice.' There is neither an attempt to remake the education system, nor any discussion of the benefits of choice. The globalisation of standards is relevant to international school expansion, as international school operators depend on programmes such as International Baccalaureate (IB) and Cambridge's International General Certificate of Secondary Education (IGCSE) in order to make their programmes appeal to parents (Resnik 2012), but this aspect relates only marginally to policy shifts. Neither are international school policy changes foisted on states by the World Bank, as public-private partnerships have been. States are key actors in the new international school policies but they are not victims of international institutions nor vocal advocates of school marketisation. And still new kinds of marketisation have appeared.

In other words, in international school policy there appears to be a form of marketisation that falls outside the main modes addressed in the literatures on global education policy and education markets. A next step, pursued in this article, is to flesh out this form of marketisation. Using evidence from six countries in East and Southeast Asia, the article documents linkages between international school policy and marketising pressure on school systems. The article identifies common themes across these countries as well as variations.

The argument offered here is that international school policy has been a means of stealth marketisation of education systems in Asia. This means has appeared because international school policy is no longer just about international schools. Policies on international schools now demarcate the boundaries of national and public education systems. Families in Asia have growing aspirations for their children to experience an Anglophone international education that local systems mostly cannot offer. In many places, private schools are prohibited from developing international curricula to serve this desire. International schools, either at home or abroad, have offered families a way to opt out of mainstream school systems. Policies on international schools either facilitate or restrict those 'opting out' opportunities. Not all policies have opened international schools to citizens, but in most countries in the region the barrier between international schools and the local education system has been breached. The effect is a *de facto* marketisation of schooling.

This quiet pathway to marketisation relates directly to such crucial themes such as citizenship, inequality, and national identity. Students who forgo the national system in favour of international schools evade a major means of socialisation. As the ability to pay high fees is a main selection criterion for these students, inequality overlays a divergence in socialising experiences.

International schools and the global education industry

Market creation is increasingly a focus of attention in research on education policy and the education industry (Komljenovic and Robertson 2017). As markets have emerged in a variety of fields, from testing to textbooks to student recruitment to school operations, the problem of how markets get created takes centre stage (Molnar 2006; Au and Hollar 2016). Government policy is crucial to the creation of education markets. As Stephen Ball (2009, 97) notes in relation to a range of education policy areas in the United Kingdom, the cause of the emergence of education businesses 'is not some kind of spontaneous neo-liberal free market, its dynamics have to be understood alongside the dynamics of and changes in the state itself and the role of the state in shaping industry behaviour and economic transactions.' Private enterprises, charitable foundations with privatising missions, inter-governmental organisations like the World Bank, and governmental actors are all involved in the formation of education markets and policies that support those markets (Ball 2012; Verger, Steiner-Khamsi, and Lubienski 2017).

International schools are simultaneously at the centre of market-creation in education and on the periphery of education policy. On one hand, as elite institutions, international schools have quickly and without much public controversy undergone corporatisation. Transnational firms began

acquiring existing international schools, in some cases operating them as branded chains. International schools today are caught up in the global education industry (Bunnell 2007; Hayden 2011). The creation of an international school business could appear almost natural.

On the other hand, international schools rarely feature in *policy* discussions of education markets. Since international schools fall outside of the domain of the education system, public policy debates over privatisation of schools tend not to touch on international schools. Creating markets for institutions that already only served an elite is not as controversial as introducing markets into a mainstream education system. International schools also do not relate to other main policy areas where marketisation is a concern. They are far removed from international organisation efforts to expand and improve schools in low-income countries, though the charitable wings of some of these school groups promote such efforts. Since they are already treated as a private domain, international schools receive little concern in discussion of public policy. This marginality probably facilitated the quiet marketisation of international schools. That is, the appearance of markets with big firms in the new international school *sector* has occurred without provoking a great deal of response, precisely because international schools are on the margins of education policy. While market creation in other areas of education provokes a strong reaction, for international schools it has not because less seems to be at stake.

If we take insights from research on the global education industry seriously, international schools deserve attention in policy discussions. That research has highlighted, following Polanyi (1957), that markets are not created 'naturally'; political authority tends to underlie market formation. Moreover, international schools are positioned at the interstices of multiple parts of global education policy networks (Ball 2012; Olmedo 2013). The largest international school providers insert themselves close to the core of public education agendas. Consider a few examples. The Varkey Foundation, run by GEMS Education boss Sunny Varkey, is linked to the Gates Foundation and the Clinton Global Initiative. The Foundation gains further prominence, especially in the media, through its Global Teacher Prize and membership in the World Economic Forum. In Africa, GEMS operates low-cost private schools with advice from James Tooley, a well-known supporter of for-profit education (Newcastle University 2016). Another school group, Nord Anglia, gains prestige through a partnership with UNICEF. At an individual level, 'experts' rotate between positions with international school operators and education posts in government, most notably in the UK.

There is thus good reason to think international schools occupy a significant place in marketising policy. The linkage between market creation in international education and neoliberal policymaking merits further attention. While the marketisation of international education appears as an easy case, international education as a field of policy has passed under the radar. Because markets now exist for international schools, patrolling the borders of the markets is a major policy task. When we look at policy, the key point that stands out is that policies on international schools demarcate the boundaries of national education systems. Policies on which children can attend international schools are policies on who has the right to leave public schools for a marketised education landscape. A main purpose of international school policy now is to regulate who is in that market and who is not. When local students are given access to international schools, it means they can shift out of the main education system. Such access can even be a form of stealth marketisation of the education system. International school policy can therefore be a conduit for neoliberal reform to an education system. For this reason, attention should be given to international school policy.

International school policy as a pathway to education reform

Three factors have made international school policy a zone for setting the boundaries of public or national education systems. First, international schools in Asia have become desirable to families well beyond those they were initially intended to serve. While international schools once mainly existed as community services for expatriate populations, they now are revenue-oriented institutions for climbing global education hierarchies. Local parents seek access to international schools for their

children. In China and Malaysia, international schools have been seen as more desirable than ordinary schools (*South China Morning Post*, 7 Sept. 2015). According to one source, some 80% of students in international schools come from the host countries (Wechsler 2017). International schools have also become reasons for mobility rather than just consequences of mobile careers. Korean mothers move with their children to Malaysia, Singapore, or the Philippines for international school opportunities (*Chosŏn Ilbo*, 26 Jan. 2008; Chew 2009). There the children can gain stronger English skills and diplomas, such as IB and IGCSE, which are legible to university admissions officers in the United States, the United Kingdom, Canada, and Australia. They opt out of national education systems in favour of international schools overseas (Brooks and Waters 2010; Collins 2013; Collins et al. 2014). International schools also offer an attractive alternative to the cram school lifestyle that afflicts much of the region. Even as public education is free (or inexpensive) and well-attended in places such as South Korea, Japan, Taiwan, Singapore, and Chinese cities, sending children to supplementary and privately-operated after-school programmes has become a norm (Roesgaard 2006; Kim 2016b; Entrich 2018). Relative to these costs, international school fees may be only marginally higher and international schools bring the benefit of reducing stress. These forces have pushed many families to aspire to send their children to international schools. They represent one pressure on the boundary between local and international schools.

Second, in the past decade, international school corporations have appeared and they offer ways for parents in Asia to have their children attend international school (Ridge, Kippels, and Shami 2016). Some of the international school operators have become very large. Three of the biggest in Asia are GEMS Education, Cognita, and Nord Anglia. Dubai-based GEMS educates 142,000 students around the world. Cognita's international schools alone have 30,000; Nord Anglia's 20,000. Each of these three firms has annual revenues in recent years between USD 300 and 500 million (Kim 2016a). School groups aim to attract not just expatriates in the same area but anyone who can afford their fees. Unlike in the past, when international schools served particular communities, they now offer a general 'product' to a wider market. Many international schools offer dormitories and actively seek students from overseas. International schools have thus been ripped from their local and community contexts and place their sights on a culturally and geographically broad market.

Market creation, though, requires public intervention, as the global education industry literature stresses (Komljenovic and Robertson 2017; Verger, Steiner-Khamsi, and Lubienski 2017). The third factor in making international school policy mainstream is that states in Asia have actively supported the cultivation of an international school sector. The drive for competitiveness lies behind this support. The 'competition state,' oriented to strengthening the nation through economic performance, 'has pursued increased marketization in order to make economic activities located within the national territory' (Cerny 1997, 259). As Bob Jessop (2002) theorises, the state has transformed into an agent of economic action. States in Asia have promoted the growth of corporate-oriented international schools to serve economic purposes. If countries compete for multinationals, then they need to offer top-rated education facilities for the children of foreign staff. Sustaining a large population of foreign residents is presented as a human resources need (Ho and Ge 2011). In many parts of the region, this motive makes governments keen to admit transnational education firms. Further, states may wish to enhance the international exposure of a selection of their own population, so encouraging school chains to serve the local population can work toward that aim. Governments have geared national projects to make education more global since their economies head toward useful knowledge and skills (Olds 2007; Lewis 2011; Sidhu and Kaur 2011). In Singapore, for example, the resources of a state accustomed to directing efforts for economic development were shifted into education and research (Mok 2008; Koh and Chong 2014). Finally, education can become a sector in itself that the state seeks to cultivate. For all of these reasons, states have welcomed international school expansion and marketisation on the grounds of serving the national economy.

These forces have made international schools a form of marketised education that places stress on education systems. Local families pushing to enter international schools, firms pouring money into admitting them, and states seeking to make their economies more competitive have all supported

international school corporatisation. Policies on international schools therefore govern access to the marketised international school sector. This interplay of market expansion and social response follows a pattern of double movement as theorised by Polanyi: pressures to marketise are met with reactions to affirm social solidarity, which in this case means protecting education system from choices to exit to international schools. In regulating international schools, states face questions relevant to the education system as a whole. Should schools be permitted to enrol citizens? If so, under what conditions? If a ban is imposed and students move abroad, should they be encouraged to return? The power of the exit option for families places tremendous pressure on states. The significance of these questions goes well beyond the small proportion of students who attend international schools. These are fundamental questions of citizenship, national identity, and inequality: What are the educational rights and obligations of citizens? Who is socialised through mainstream education as a member of the nation? If wealth is used to avoid socialisation in the nation, then what are the implications for inequality? International school policy is now concerned with responding to these big questions. These difficult issues provide the backdrop to the flurry of policymaking on international schools. Through international school policy, states try to reconcile concerns of citizenship and stratification against those of competitiveness.

The task here is to understand how governments have responded to this marketising pressure. The experiences of six countries that have recently adjusted their international school policies illustrate state responses to the task of maintaining the boundaries of the school system. These can be organised into three pairs. Each pair shares a common context or challenge. First, in the former British colonies of Malaysia and Singapore, managing ethnic pluralism is a key task for education policy. Second, in the democracies of Indonesia and South Korea, states have had to respond to affluent citizens opting out of public education. Third, in the post-socialist states of Vietnam and China, marketisation of schooling – which occurred in the context of marketisation of many spheres – quickly created a diversity of education opportunities and experiences. This set of countries is useful for identifying the range of responses evoked by similar pressures. None completely shuts local students out of the marketised international school landscape, though the degrees and kinds of separation vary.

Managing difference and inequality in former British colonies

The two states from the former British colonial territories of Malaya form a natural comparison. They have a shared history, and many common institutions and laws. International schools, several established in the early twentieth century, served the substantial British and expatriate populations. The colonial period also saw the founding of large numbers of private schools, which became the premier education institutions in both places.

A core issue facing the states since Singapore's formation as an independent state in 1965 has been the handling of ethnic diversity. Malaysia has a Malay majority and a large Chinese minority and many Indians as well; Singapore is mostly Chinese but also has Malay and Indian populations. In Malaysia, ethnicity was made explicitly political, as a ruling Malay group, Barisan Nasional, maintained power for five decades until 2018 by making entitlements specific to Malays and other 'sons of the soil' or *bumiputra*. English was abandoned by many schools in favour of Malay as the language of education. In Singapore, by contrast, the priority was to keep an outward orientation so as to remain a trade and financial hub. English became the medium of education, and Chinese medium schools were suppressed. In the name of preserving racial harmony, Singapore's rulers have banned speech and organisation that could stir up communal tensions.

Malaysia

The public education system in Malaysia favours *bumiputra*. University admissions policies also give priority to this group. Private education, from primary through tertiary levels, serves excluded, non-*bumiputra* Malaysians (Welch 2011, 59). Older English-medium schools, as well as Chinese-

language schools, continue to cater to these populations. Ethnic policy created space for private educational institutions to grow. In other words, the national education system is an exclusive one that encourages many to turn to private options. In this system, international schools are treated as a type of private school. Private schools, in turn, contain two categories, international schools and independent Chinese high schools. Most regulations on international schools have been the same as those for private schools more broadly. A rule specific to international schools was, until 2012, that the proportion of Malaysian students at each school should not exceed 40%.

Any barrier between international schools and other private schools came crashing down in 2012. In that year, two key policies shifted. First, the government abandoned an attempt to make English the compulsory language for teaching mathematics and science, a policy that had been introduced in 2003. Then-prime minister Mahathir bin Mohamad argued that with better English skills, young Malaysians would become more employable (Mandal 2000, 1002, 1011; Yang and Ishak 2012, 452). However, the policy did not help. By 2012 it was clear that teaching mathematics and science in English was leading to poor results in those subjects. Only some 28% of students recorded a minimum score in a national English examination in 2011 (Ministry of Education Malaysia 2013, 33). For this reason, the government retreated from the policy. As a result, families wishing for their children to continue with an English-language education would have to look beyond the public education system.

A second policy shift in 2012 lifted the 40% limit on places for Malaysians at international schools. Instead, international schools could admit as many Malaysian children as they wished. In combination with the withdrawal of mandatory teaching of mathematics and science in English, this policy unleashed tremendous interest in international schools among Malaysian families. Affluent Chinese in particular were drawn to international schools. These schools had been growing, the government was turning away from teaching in English, and now there was no legal barrier to attending them. Especially for parents who had experienced difficulty finding work due to poor English skills, this confluence of changes gave them good reason to give international schools a hard look.

The effect was instant. In 2013, the number of Malaysian students in the country's 126 international schools surpassed the foreign students. In 2012, 15,000 Malaysian children were studying in international schools; by 2017, the figure reached 39,161, according to official statistics from the Ministry of Education (*New Straits Times*, 23 April 2017). The number of international schools quickly exceeded the number planned by the Malaysian government: state plans set 87 schools as the goal by 2020 but by 2017 there were already nearly 50% more than that figure. These schools were supposed to teach 75,000 students by 2020, but by 2017 already 61,156 were enrolled (Yang and Ishak 2012; *New Straits Times*, 23 April 2017). Malaysian students now outnumber foreign students two to one in international schools. While government support for international schools was initially to attract students from overseas, the result has been to see Malaysians shift into international schools.

Singapore

As a 'world city' hosting the offices of multinational corporations, Singapore has a substantial expatriate population and numerous international schools. In the past ten years, the international school landscape has expanded greatly. Schools previously serving families from a particular nation have shifted to offer 'international' programmes. The German School thus became the German European School, Singapore. The large international school operators have moved in as well, taking over some of these schools. For example, UK-based Cognita acquired the Australian International School. These shifts de-link international schools from the communities they were once affiliated with and make them more attractive to a wider range of families.

State efforts that divide international schools from the national education system are rooted in the historical development of education in the city-state. Singapore inherited an education landscape

with many private schools, especially for the majority Chinese community. These schools were pillars of Chinese communities (Visscher 2007). After independence, the ruling People's Action Party was concerned that these schools could serve as a political base for an alternative elite. The establishment of English-medium government schools worked to decimate Chinese schools; the forced merging of the Chinese-medium Nanyang University into the National University of Singapore in 1980 dealt the last blow to Chinese education in the city-state. While the state has more recently allowed for 'independent' junior colleges operated by private foundations, they remain governed by the Ministry of Education and for-profit bodies are prohibited in this sector. The elimination of Chinese schools also served the social and economic plans of the leadership. Since the republic's establishment, the state has made education a crucial instrument for the country's economic success. A common argument, for example, was that being an island with no natural resources, the human resources of the population represent Singapore's best economic hope (Lee 2011). As 'human resources,' citizens should be cultivated in a way that makes them useful to the Singapore economic project. Education has a major role to play in this task. A component was to make English the main language of education, so that the environment would be attractive to multinational corporations. In these ways, constructing a national education system was a core political project. Unlike in Malaysia, there was no space for Singapore schools operating independently.

Singaporean students are largely tied to the main education system and do not have access to international schools. Students holding Singapore passports are barred from registering for international schools, except in special situations when permission is granted by the Ministry of Education. This regulation draws a clear line separating international schools from the rest of the education system. The only blurring of this line is in three international schools operated by local schools. Singaporeans are permitted to attend them.

There are thus two main forces keeping the international school space and local students separate. First, state policy has prevented most international schools from admitting Singaporean children. This policy builds on the history of the state reining in control over private education. Second, because mainstream education has long been internationally-oriented, and mostly in English, international schools are less distinctive in this context. Even where Singaporeans can attend international schools, there has not been a rush to do so. The Singapore curriculum is itself based on what was inherited from the British. Singapore students take GCSEs. For those aspiring for academic success, an international school may not be desirable. There already are well-worn paths from local schools to the world's most prestigious universities. Moreover, these paths are precisely what have defined Singapore's elite (Ye and Nylander 2015).

Defining citizenship and legitimising differences in democracies

In two of the region's democracies, the challenge has been different. Both Indonesia and South Korea have national education systems that integrate their populations. However, in the face of economic liberalisation, both have seen students leave public education in pursuit of private, internationally-oriented education opportunities. The problem then has been to reconcile families' rights to consume education and protection of the national education system.

South Korea

In South Korea, the education system has traditionally been tightly controlled by the Ministry of Education. While private schools exist, they remain subject to national rules. The central government dispatches teachers and sets the curriculum. Fairness and patriotic obligation justify this rigid approach, which lies at the opposite end of the spectrum from Malaysia. State control extended to eligibility for international school admission. In the past, international schools were limited strictly to the children of non-Koreans. This segmentation was effective. However, in the 2000s, many families started sending their children overseas for primary and secondary education. In

many cases, mothers and children would move to a destination with desirable schools while the ‘wild goose fathers’ stay behind and earn income (Chew 2009). In other instances, the child would be packed off to live with a legal guardian matched through a middleman (Collins 2012). Officials argued that the departure of so many children represented a loss of funds for the country. The government sought ways to encourage these students to return and see their schooling out in Korea (Korea Education Development Institute 2009).

The country’s policies seem to demonstrate a serious approach to preventing international schools from undermining national education. At the same time, though, the state has created regulations that allow a number of loopholes that permit Koreans to gain an international education in the country. One set of loopholes lies in the complicated legal categories that have been invented around international education. ‘International schools’ (*kukje hakkyo*) are distinct from ‘schools for foreigners’ (*waegugin hakkyo*), as the former are strictly not permitted to admit Koreans. The latter can admit Koreans who have been abroad for a given period; that period was five years and in 2009 was reduced to three years. The proportion of students who meet this criterion is capped at 50%. Yet another category, ‘foreign education institutions’ are run by foreign corporate bodies and can take up to 30% Koreans regardless of time spent abroad.

Differences in rules across space create further loopholes. A special law grants Jeju Island and free economic zones fewer restrictions on opening international schools (Act 14147, 29 May 2016). The provincial government on Jeju Island, which has greater autonomy than other local governments, established a zone for international schools with no limit on the percentage of Koreans enrolled. Four new international schools were built, three by independent schools from overseas. These schools are expressly for Korean children. The provincial government saw the opportunity to attract families who were abroad or considering moving abroad for international education. One source indicates that ‘24 out of 100 Korean students in Jeju international schools are from Kangnam,’ the Seoul district associated most with expensive education (Ku 2014). This pattern stands in tension with the requirement that Korean children should participate in national education.

In the South Korean example, the education system is oriented to giving everyone the same socialising experience and opportunities. However, policies on international schools have now exposed the general population to the marketised international school space. Wealthier Korean families are permitted to send their children to expensive, non-Korean schools. This move has implications for national identity as well as for equality. Those who attend international schools miss Korean history lessons and have less exposure to the Korean language. These features mean that international schools are not training students as engaged Koreans, but as detached ‘global’ citizens. The continuing desirability of the domestic education hierarchy tempers the permeability of the boundary between international schools and the education system. Because top domestic universities continue to produce social elites, many families still prefer to remain within the education system.

Indonesia

In Indonesia, the longest-running international schools once served families of the Dutch colonial elite. These schools have since been brought into the global circuit of international schools. For example, the Netherlands Inter-community School in Jakarta, established in 1967, is now operated by Hong Kong-based Nord Anglia Education. Further, the number of international schools grew tremendously in the early 2000s, as many Indonesian children began studying in them.

Concerned that international schools were growing quickly while charging high fees and offering questionable education, the state made new regulations. As education ministry spokesman Ibnu Hamad stated, ‘the intention of the regulation was to weed out low-quality schools that charge a premium by adding ‘international’ to their name’ (*Jakarta Globe*, 4 Dec. 2014). This strategy of private schools placing the word ‘international’ in their name largely as a marketing device has been noted elsewhere (Hayden 2006, 10). In 2014, Indonesia passed legislation introducing a distinction among

international schools. Under the new regulations, schools linked to foreign entities, usually embassies, are governed by one set of rules and other ‘international’ schools by another. Only foreign passport holders can attend the former, while Indonesian citizens are permitted to attend the latter.

A more stringent set of laws now governs this latter category. A first is that none could use the word ‘international’ in the school name. Schools have responded by changing their names. Jakarta International School, for instance, became Jakarta Intercultural School. In addition, all schools, with the exception of foreign-operated schools, should provide instruction on Indonesian culture and language. In these international (or ‘intercultural’) schools, Indonesians thus retain connections to their country. Students even take national examinations, just like their compatriots in other schools, after the sixth, ninth, and twelfth grades of school. The policy has led to criticism that Indonesian graduates would be behind in ‘an increasingly globalized world’ (*Jakarta Post*, 12 April 2014).

Protecting national identity and empowering markets in post-socialist contexts

For the post-socialist states of China and Vietnam, cost-based differences in education opportunities are a more recent phenomenon. Any international education institutions were strictly for foreign diplomats; no private education system existed. As these societies became more commercial, marketisation crept into education (Mok 2008). Emerging private schools took on features of international schools, and foreign populations demanding international schools also increased. In both countries, international school expansion raised the question of the extent to which the affluent population would be permitted access to schooling separate from the education system that serves as a central means of socialisation into the nation.

Vietnam

A variety of internationally-oriented education institutions have opened in Vietnamese cities in the past decade, and Vietnamese families show a great interest in them. In response, the state has re-written its regulations on international schools. Foreign-invested schools can enrol only a limited number of Vietnamese citizens. Bilingual schools comprise another category of the schools. These schools offer classes in English or another foreign language, in addition to Vietnamese, and they also use components from the Vietnamese education curriculum. As long as these components are included, local students are permitted to attend bilingual schools. The compromise here shares features with Indonesia, where local attendance at international schools is contingent on elements of the national curriculum and language being used.

Until 2018, Decree 73/2012/ND-CP (‘Decree 73’) governed foreign-invested schools. This law was considered a hurdle to gaining education investment from foreign investors (*The Pie News*, 17 May 2017). In February 2017, the Vietnamese Ministry of Education and Training introduced a revised draft decree. The revised regulation, which went into effect in August 2018 as ‘Decree 86’ (formally, Decree 86/2018/ND-CP), favours foreign capital in education. A major revision is the raising of the cap on Vietnamese nationals in foreign-invested schools. Previously, under Decree 73, children with Vietnamese nationality could account for up to ten per cent of the students in foreign-invested primary and middle schools, and 20% in foreign-invested high schools (Conventus Law 2017). Now, under Decree 86, up to 50% of students in each foreign-invested school can be Vietnamese. The motive for the revision is similar to that in South Korea: according to Phan Manh Hung, the attorney who assisted the Ministry of Education and Training to draft the new decree, the government should encourage Vietnamese students not to move overseas for school (*The Pie News*, 17 May 2017). The Department of Overseas Training (under the Ministry of Education and Training) reports that 130,000 students were studying abroad in 2016, which represents an increase of 20,000 from the previous year (Vietnam Australia International School website, 2017). Studying at an international school in Vietnam is an alternative, one that is preferable in the government’s view.

The Vietnamese state is caught between priorities of developing education as a sector, retaining students, and maintaining the integrity of the national school system. Policy appears shifting decisively toward marketisation of the education system through international schools. The nod toward protecting national identity will have little impact if the proposed lifting of quotas on Vietnamese students goes through. Decree 86 is one of the clearest vehicles of stealth marketisation. The lawyer in charge of the revision comes himself from the foreign-invested education business; he is a link between the international education industry and the re-making of education policy. The major international school groups have gained a foothold in Vietnam – Nord Anglia acquired a set of four British schools in 2015 – and their interest in the country is surely related more to the local population than the foreign one.

China

Private education has expanded rapidly in China since the 1990s. Demand from parents for internationally-oriented education has been substantial. Parents have also demonstrated a willingness to invest in their children's education in various ways and at increasingly young ages. Besides the content of the education, the packaging of schools increases their appeal. International schools can be luxurious, a fact that is reflected in fees. Some schools boast facilities that can be highly desirable. In Beijing, for example, air pollution is a constant concern for parents. The International School of Beijing responded by encasing its premises in a pressured USD 5 million dome with air filtration (*CBS News* 17 July 2013). Such an arrangement serves as a physical manifestation of the school's exclusivity.

The main guideline on international schools is that Chinese-owned entities can admit Chinese nationals as pupils (*Relocate Global*, 28 April 2017). Foreign-invested schools cannot enrol Chinese children. However, at the secondary level, foreign-invested schools can take in local students. These rules create space for international schools to enter and cater to Chinese families. According to the International Schools Consultancy, in 2016, 550 international schools were registered in China and 440 of them could admit local students. In these schools, more than 150,000 Chinese nationals gain an international education (*Straits Times*, 24 Sept. 2016).

There are four types of schools in China's international education landscape. The first are expatriate schools, officially called schools for children of foreign workers (SCFWs). These provide international education for foreign families living in China and Chinese who hold foreign passports. Those who hold only domestic citizenship cannot attend. A second category encompasses Sino-foreign cooperative schools. These joint ventures can be established only at the secondary level. The Chinese owner provides land and financial investment, while the foreign firm brings a curriculum and the school name. Chinese students can enter this second type of international school. Bilingual schools comprise a third category. This type of school, which usually offers IB or IGCSE programs, has no limit on attendance by Chinese nationals. State schools make up the fourth type of international school. Many publicly-operated schools run connected international schools, open for local students, at the upper secondary level (Yang 2011). There are thus several routes by which local students are exposed to the marketised international school sector.

Even in SCFWs, school operators remain oriented to Chinese students. Owners view their schools as part of a bigger strategy to appeal to the large, local 'market.' The first step in this strategy is to establish an SCFW. Then, on the basis of the reputation received from that school, a firm opens a school for Chinese. For example, Dulwich College began by setting up schools for which only foreign children were eligible. As the brand gained reputation and experience in the country, it moved on to cooperate with Chinese schools. In this cooperation, Dulwich supplies international education components to the local schools. Two schools in Suzhou and Zhuhai offer British curricula to Chinese students thanks to the assistance of Dulwich (websites of Dulwich International High Schools in Zhuhai and Suzhou). Policies cannot keep education firms restricted to an international school space that is clearly separated from the education system.

Comparisons in the region

This survey provides a basis for identifying both common themes and variation in linkages between international school policy and marketisation of domestic school systems. A pattern seen in all six countries is that the corporatisation of international schooling spills over to create marketising pressure on national school systems. As international schools have become more visible and perceived as desirable, more families have sought to gain access to them. States have a set of tools for expanding or narrowing exposure to the marketised international school sector. The use of these tools differs by country. The most direct tools are citizenship criteria for entering international schools and rules on registering international schools. All the countries discussed here impose citizenship criteria, though these are loosest in Malaysia. In South Korea, China, and Vietnam, these criteria have been relaxed in recent years. Rules for registration of international schools have experienced change across the region, as categories of schools have proliferated. Indonesia and South Korea have invented new categories of schools, as has China. New categories of schools in these countries allow students with no or few foreign connections to opt out of national education systems. Also because of these innovations, terms such as ‘international school’ or ‘foreign school’ take on different meanings depending on the regulatory context. Land-use policy is another means of shaping marketising pressures from international schools, given that acquisition of desirable land is one of the top challenges for an international school and that governments can control access to property or make zoning regulations. In land-scarce Singapore, land-use policy gives state planners leverage in influencing the establishment of international schools.

The contrasting experiences of Singapore and Malaysia point to ways conditions and not just international school policies shape the position of states in managing the marketising effects of international school corporatisation. The special circumstances of having an English-language, colonial-based education system make it easier for the Singapore state to keep locals away from international schools. Since all schools offer what others might consider an ‘international education’ anyway, there is not much push for Singaporeans to exit the local system. The contrast with Malaysia is stark. While Malaysia inherited similar colonial education institutions, the state made racial difference a foundational point of education policy. As a result, international schools bled into the private system. Authorities have permitted, even encouraged, international schools to take on parts of the education system. The meaning of ‘international school’ is thus more like a private school rather than one serving an expatriate population. Malaysia today stands as an example in which the state offers almost no protection of citizens from marketisation in the international school sector. It should be pointed out that Singapore’s policies do not stem from an aversion to education commercialisation in principle. Many aspects of education in Singapore have been commercialised, including especially early education, supplementary programmes, tertiary education, and vocational institutes.

Unlike in the former British colonies, in the democratic countries examined here the state has sought to build inclusive national education systems that do not take English as the main language. Indonesia and South Korea share the dilemma of maintaining these systems while a proportion of wealthier families have opted out of the public school system, either by moving overseas or by attending international schools in the country. Concerned that these trends can undermine the school system as a site of socialisation and national integration, and can also exacerbate inequality, authorities have sought to limit access to international schools. Neither has aimed to eliminate local attendance at such schools, but both have introduced new distinctions between foreign-oriented schools for citizens and non-citizens. Indonesia’s policies go further than South Korea’s in re-imposing boundaries on the national education system, although in Indonesia English-medium schools – there are 75 in Jakarta (*Relocate Global*, 29 Jan. 2018) – are more prominent than in South Korea.

In the two former socialist states, international schooling has grown quickly and corporate interests have been especially eager to gain access to the domestic ‘market.’ Although the political and educational landscape in China and Vietnam differ greatly from Indonesia and South Korea, in all of these countries the state has been unable to make a sharp demarcation between international

schools and the main school system. Deregulation in Vietnam allows foreign education firms to establish a strong presence in the country. In China, by contrast, recent regulations limit opportunities for foreign firms while expanding those for domestic ones. The emerging pattern in China is one of Chinese school operators gaining the largest slice of premium, internationally-oriented schooling for local students. State support for domestic education businesses stands in tension with protection of the national school system.

The marketising effects noted here are 'stealth' in at least two ways. First, because international school policy appears marginal to the education system, these policies tend to be subject to less scrutiny. In country after country, states make compromises that allow the boundaries around public education systems to be breached. Second, ideologies of 'choice' have not accompanied policies that have marketising effects. In many parts of Asia, unlike in the United States or the United Kingdom, arguments about 'school choice' carry little weight. Fairness is often a more important public value for education, especially in South Korea or Japan, but also elsewhere. That is, the purposes of public education systems are to prevent entrenched class privilege and to enhance social mobility. Whether those aims are achieved is another matter, but policy is often justified in terms of creating opportunities for and imposing constraints on everyone. Marketisation through international schools happens without any noisy, direct discussion of the merits of markets.

Conclusion

Across Asia, states are under pressure to allow their citizens to enter corporatised international schools. This pressure is partly of states' own making, as they have encouraged markets to grow in the international school landscape. Wealthier families now view international schools as a desirable choice. These families do not advocate for 'choice' as a value, nor are there public discourses around international schools in the region celebrating 'choice' in education. The mode of market creation has been subtler. The perception of choice is precisely a marker of marketisation spilling over from international schools into mainstream education systems. This is a stealth mode of marketisation. In international school policy, the scope of this marketisation of whole education systems is at stake. All of the states here have made compromises in their international school policies, compromises that allow markets to creep into national education systems.

International school policy has become a major component of mainstream education policy in Asia. Policies on international schools relate not just to expatriate families but to the viability of national education systems. As families with means opt out of public education systems, they enter schools that socialise them in a different culture from their families. The cultural, social, and political implications are tremendous. Will, for example, the Vietnamese elite of the near future read and speak Vietnamese? Will they be closer to Vietnamese culture or to a 'global' elite consumer culture? Will they move abroad, or will they become an elite within Vietnam that is culturally and socially remote from the rest of society? The biggest question, the one that underlies this trend, is, if the elite opt out, then will pressure to maintain and improve education systems for citizens decrease? These crucial questions, which may be asked of most countries in the region now, emerge from shifts in policies on international schools.

Stealth marketisation is distinct from other modes of education market creation. It proceeds through quiet encroachment rather than through direct debate over the education system or through predation of third world governments by wealthy transnational corporations. International school operators do exert a marketising pressure, but states in the region are, by and large, too effective to succumb to such efforts at policy capture. Rather, states have been willing accomplices in the weakening of national education systems. They did not set out to undermine mechanisms for national solidarity, but in using education policy for economic planning, they made decisions that later forced them to compromise. International school policy offers a warning that avenues to education marketisation may appear quietly on the fringes of education systems.

Disclosure statement

No potential conflict of interest was reported by the authors.

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