

**Appropriating English: The Global Business of Teaching
English in South East Asia**

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This paper¹ is a discussion of the nature and character of the markets in English Language and the way in which English language and teaching is characterised by a series of markets in which there is strong and vibrant competition between a diversity of providers attempting to secure a share of growing international market in programs, products, methodologies, teacher training, teacher recruitment and placement. This paper explores aspects of the nature of this competition with particular reference to South East Asia. The chapter highlights the dilemmas and challenges that emerge from the development of a multileveled and trans-national market in English language teaching.

English The Only Global Language?

The global languages of Asia include Arabic, Mandarin, Hindi and English and although English is identified as the global language some of the criteria around these claims also apply to the other languages as well. All these languages are involved in:

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- Global trans-national commerce and the basis for negotiation, transaction, and processes of production, exchange and distribution of goods around the world. The use of Arabic, Hindi and Chinese as languages of trade and commerce have a long history and pre-dates the arrival of English. The claims that English has displaced these languages needs to be critically analysed as the development of pan-Islamic alliances in commerce and the rapid growth of the Chinese economy suggest that these
- The production, presentation and servicing of ICT including web development, software developments and the production of ICTR packages, Indeed Chinese and Indian workers make up significant part of the IT workforce in the US and also centres such as Hyderabad and Shanghai are "boom" centres for the IT industry.
- The production of cultural, artistic and popular culture beyond the confines of the borders where the language is spoken. For example Chinese language martial arts movies now have an appeal beyond the Chinese speaking communities. The "Bollywood" blockbusters have also eclipsed Hollywood and its products have now developed a global market beyond the Hindi speaking community.
- The production of new ideas, notions and concepts that are identified with the post-modern moment. There is in the attitude of the English language "truimphalism" which has a view that modernist thought and action can only be created, expressed and described in English. This latest variation of cultural arrogance and ethnocentrism neglects the more obvious manifestations of a developing Asian identity through such things as architecture and design which is starkly evident in such cities as Kuala Lumpur, Shanghai and Singapore.

Depending on how the notion of regional language is expressed and imagined Bahasa Indonesian/Malay both have an important status as a regional languages spoken by an estimated 600 million people in a geographic reach that spans one eighth the size of the globe from Southern Thailand, across the archipelago to West Papua and the Australian territory of Christmas Island.

In addition English is also not the only European language in use in Asia as French and Portuguese have some presence in parts of Asia. Indeed the emergence of an independent East Timor has seen a revival of Portuguese and the continued use of Indonesian in conjunction with the indigenous language of Tetum. The global language of English seems to have been allocated an ambiguous status in the period of state building in the new nation of East Timor.

One of the dilemmas that nation states have to address is the tension between the need to resource the teaching of English as a means of participating in the global economy and at the same time responding to the need to maintain and sustain the national languages of the nation state project. In Malaysia's case this has meant that the government, alarmed at a perceived drop in proficiency of English, and its impact on delaying the shift from a production economy to knowledge economy, has chosen to strategically reposition English in education (Mahathir 2002).

Already the Malaysian government has sought to displaced the national language of Bahasa Melayu with English in the teaching of Mathematics and Science in schools. Although Malaysia had already a strong linguistic heritage of English having been a British colony until independence in 1957, it has been subject to a shifting importance. The use of English giving it a special status until 1970 when the internal priorities of state building meant in the post 1969 period meant that Bahasa Melayu was assigned the special constitutional status as the national language.

By the early 21st century this situation had been changed with English undergoing a significant revival. The explanation for this shift lies partly in the way in which English has been linked by the ruling elites in many Asian countries to the political economy of neo-liberal global developmentalism and the promise of greater prosperity (Kell 2004; Gomez & Jomo 1999). This analysis of English neglects the binary nature of the language that sees English proficiency simultaneously utilised as criteria in high earning professional occupations and also unskilled low paid domestic occupations. However in 2002 the government at the time led by long term Prime Minister Dr Mahathir had sought strengthen and reinforce the proficiency of English at all levels of the schooling system with the objective of securing Malaysia's participation in a global and information technology driven economy.

Why English? Language as a commodity.

There is one salient feature that differentiates English from other Asian and European global languages. It is the way in which English has been subject to and driven by commodified and characterised as a marketable product (Habermas 1990). In the context of a post-industrial society English has assumed an important status as providing access to economic, educational and immigration opportunities (Singh, Kell & Pandian 2002). This linkage with prosperity and opportunity is not new as in countries like Malaysia where the possession of English language skills provided an entry into the colonial economy. The colonial elite were characterised by the

knowledge of English and the cultural traits that the British colonisers were comfortable with in order to secure economic benefits of colonisation (Mahathir 1976).

In the post-colonial era, proficiency in English is linked to good jobs, reduced periods of opportunity, overseas study opportunities and the possibility of migration to desired destinations such as the United States, Australian, New Zealand and Canada. Even at the lower end of the employment structure English is needed in the newly expanding areas of the human services sector such as tourism, hospitality, domestic service and the expanding sex work industry in South East Asia. The promise of wealth and prosperity that is imagined by many who crave English proficiency is partly fuelled by the imagery of consumption and gratification that represents "mainstream" Anglophone popular culture in music, movies and computer based entertainment.

Indeed the linkage with consuming images also provides a promise of glamour, individuality and consumption. It is this link with imagining new futures that fuels a hypermarket of competition in English Language Training. Malaysia has been one of the most active markets and continues to be an indicator of future developments in what is increasingly a trans-national industry.

The English Business: Multileveled Trans-national Providers.

There is a great diversity of providers in the global ELT market that gives the impression of a confused and discursive market. However there clear evidence of a well-established hierarchy that represents a differentiated market structure. The global ELT operates in multi-leveled pattern consisting of variety of providers that the authors of *Appropriating English: Innovation in the Global Business of English Language Teaching* have termed National Flagship Providers, Hybrid Enterprises and Shop front College Operations (Singh, Kell & Pandian 2002).

National Flagship providers are groups operating in transnational competition that are funded by nation state governments to conduct both cultural education, educational services and language training. These Flagships are generally typified by an integrated program which sees the cultural, educational and social activities merged with political and economic roles to further the national interests of governments in specific regions. One of the longest established Flagships is the British Council, an arm of the British government a directly funded by the Foreign office and more recent IDP Australia funded indirectly by the Australian government through the Australian

universities. Both of these organizations operate with the objective of promoting a national image and selling nationally "branded" educational products.

While there is clearly strong direct competition between the British and Australian flagships there is also strong mutual interests that sees collusion between these national flagships. Most notably the British Council and IDP have strong interests in preserving the integrity and status of the International English Language Testing System (IELTS) which they own as both a measure of language standards and quality assurance. The preservation of this against American attempts to break the IELTS testing stranglehold sees a mutual alliance around the testing process against a backdrop on escalating competition (Singh, Kell & Pandian 2002).

Hybrid Enterprises refers to the emerging integration of public and private education and training organization that operating in consortia. This also includes the growing involvement of non-education providers such as publishing and multimedia firms in the global ELT market. This group of providers now includes private arms of universities as well as international consortia of previously independent language schools into franchised language schools. Many of these consortia have global dimensions and operate like franchised chains with branches across Europe, Asia, North and South America.

There is a growing group of Hybrid enterprises that involve partnerships with publishing, multimedia and IT firms and more traditional education providers such as universities. These groups include such groups as Study Groups International and English One. As ELT providers are utilising new technologies of learning these partnerships take on a new strategic imperative to mobilise resources, expertise and address language training at a global level(Singh, Kell & Pandian 2002).

Shop front College Operations are a growing number of independent small operators below 10,000 students that are both private and some private, which provide a range of ELT services. Many have been long established organizations that are generally private owned are located in city locations. Shop front College Operations are varied in size and ownership structures as well as program delivery but are heavily reliant on securing proficient teaching staff and securing alliances with well recognized to local or overseas partners to maintain market credibility. They

are also dependent on ELT curriculum, methodology and products developed by National Flagships. Their edge often lies in lower pricing, more accessible hours and established reputations. In the face of strong competition many of these Colleges are subject to significant criticism about quality assurance. Long established and reputable College operators are under strong pressure to enter into the partnerships that typify the Hybrid Enterprise category (Singh, Kell & Pandian 2002; Lee 1999).

National Flagships Flying The Flag Overseas: British Council and IDP Australia.

While the ELT industry is intensely competitive in many parts of the world it is strongly influenced by the “flagship” of English national interest, the British Council. The Council offers those working in the new transnational education order some useful insights into the cultural dynamics of the globalised ELT industry. While the Council correctly claims to be an independent, non-political organisation, registered in England as a charity, at another level it is also an arm of the British foreign office and as such an instrument of the English government’s cultural and economic policies.

Through spreading the study and use of English world-wide the Council seeks to further the business and political interests of the British government throughout the world. It does this by providing access to English ideas and expertise through the English language education and training, books, and information on the arts, science and technology. In 1995 the Council launched the English 2000 Project as part of its strategic investment and performance management program to

facilitate informed debate about [and to forecast] the future use[s] and learning of the English language worldwide [...] and to help develop new means of teaching and learning English. The project team works to position British English language teaching goods and services to the mutual benefit of Britain and the countries with which it works (Graddol, 1997, p. i).

The British Council, a long-standing participant in the global ELT industry has shifted away from merely offering English courses towards a sophisticated integrated suite of products and services.

Whilst the Council's priorities have moved beyond these large-scale programs it still highly values the relationship between ELT and national development. Evidence of this is to be found on the British Council's world wide website where the dilemmas of development is summarised as follows:

Language is an essential component in development. Without the ability to communicate what their real needs are, people risk having solutions imposed on them and being denied access to information which will assist them being empowered to make their own decisions. (<http://www.britishcouncil.org/english/lang/dev/index/html> accessed 2002)

The English language is not seen as an imposition by globalisation from above but is assigned a prominent role in people's empowerment:

What type of communication and in which language will depend on a variety of factors; often the first language be most appropriate, at other times the regional or national language and at yet others English- as the main language of global communication and business, will be most appropriate. (<http://www.britishcouncil.org/english/lang/dev/index/html> accessed 2002)

Here English is strategically linked to the enhancement of national economic development. For English to be used as a means of alleviating poverty the proposition is put that there must be a combination of low-cost reading materials and trained teachers capable of using those materials. The Council's approach establishes an integrated market involving materials, teacher training, professional development and the methodologies needed to support them (Singh, Kell & Pandian 2002).

These policies ensured that the Council, and its programs, has a significant presence in the former English colonies. This has enabled former colonies to retain a focus on London, even when post-colonial regional interests dominate national policy debates. In recent years the presence of the British Council in Malaysia and its technical programs in supporting language teaching and curriculum development has seen the Council secure significant influence in the curriculum design of teaching mathematics and science in schools in English (Singh, Kell & Pandian 2002).

These institutional shifts have also been replicated by the cultural and educational arms of their governments including Australia. The Australian National Flagship equivalent is the International Development Program (IDP Australia) that is funded and owned by all 36 Australian universities. Like the British Council it aggressively markets Australian university education and English language courses, some of which are run by IDP itself such as the Australian Centre for Education in Cambodia. IDP has a head office in Canberra and offices in 31 countries and represents some 250 Australian educational organisations. IDP's role has expanded from a recruitment agency to actually operating programs on site in direct competition to the British Council and some of its members programs. In Phnom Penh IDP managed the Australian Centre for Education Australian where there are over 2,000 students in English programs that include English for Academic Purposes (AEP) as well as vocationally oriented courses. This emergence of vocational courses has seen IDP's operations expand into the vocational education and training sector using English as a "front ending" to technical and vocational courses (Singh, Kell & Pandian 2002).

In Malaysia vocational programs have been introduced with a cross-sectoral variation with the involvement of Charles Darwin University a multi-sectored university from Darwin in Northern Australia. This has been operating as a TAFE Institute in Seremban in Peninsular Malaysia.

The Hybrid Enterprise: The New ELT Providers.

Many of the organisational shifts that have happened in the education and training sector more generally have been amplified in the highly competitive ELT industry owing to the heightened competition and the need to operate in more cost effective configurations than large scale bureaucracies. The monolithic bureaucracies that characterised the early period of the nation state and the provision of education are rapidly being transformed into new the hybrid learning enterprises described in the earlier part of this chapter. Even in Asian countries where the state has steered developments in education, increasing numbers of public training providers, including those involved in the delivery of ELT programs are entering into strategic alliances and consortia with private providers

In Malaysia, for example, these hybrid projects include twinning and articulation arrangements with partners Sunways, a private real estate and resources corporation, linked with Australia's

Monash University and Victoria University of Technology through joint campus in Kuala Lumpur. In Cambodia Malaysian universities are also teaming up with local providers to compete against Australian providers. The Universiti Utara Malaysia conducts business courses in Phnom Penh in collaboration with the Cambodian National Institute of Management.

These “hybrid organisations” blur the boundaries between the private sector and the corporatised public sector. These new hybrid education corporations develop multiple partners and create subsidiary companies to increase their flexibility. In the ELT industry where there is high activity and competition these business arms create the capacity to conduct operations outside government regulations. This enables the private arms of universities to set differential employment conditions, student fees and pay profits as dividends to partners. It has also led to some spectacular corporate collapses as some providers have been unable to sustain market position and remain profitable. There are several types of relationships emerging that involve different types of programs and institutional arrangements.

- **Joint Off Shore Campus:** This shift in the market involves off shore campuses in major growing markets being established by Australian universities. These are often in partnership with a local partner or partners from either the private or public sector. Some examples included the Monash University Malaysia campus in Kuala Lumpur that operates in partnership with resources and property company Sunways. Some universities offer the complete course at the off-shore campus or part of the final stages in the degree conferring country. The business risk tends to be higher in this type of operation than other forms of off shore operation.
- **Badged Programs:** These are often described as “twinning” programs and involve a joint arrangements between local partners and an Australian university. The local partners usually conduct the teaching with local staff or with short-term teaching visits from the Australian university. In Malaysia, for example, these courses have marketed their courses using a formula such as 3+1 to represent a course structure where three years of study in the home country are linked to one year of overseas study. In some cases the “badging” university only conducts an internal quality assurance process which involves an annual quality assurance visit to verify teaching and assessment quality.

- **Feeder Programs:** Related to the "badging" of programs but does not involve the active participation of an Australian provider (Lee 1999). Australian providers agree on a credit arrangement with provisions for recognition for entry or credit into Australian onshore programs. Local partners may have multiple credit or articulation arrangements with overseas providers and these agreements may not be subject to the quality assurance by an overseas partner. Some overseas partners are reliant on local national accreditation in extending recognition.

Typically, these many of these offshore joint ventures offer students the "cost-effective" opportunity to undertake a greater proportion of their education within their home country to obtain an overseas qualification. During the 1997 recession when Asian currencies devalued dramatically these options minimized costs and had the additional appeal where many courses were taught in English or had option to "front end" programs with English programs. These "in country" programs had the added advantage of not requiring a lengthy period in a foundation English program that are required in many Australian universities as a pre-requisite to entry into formal degree programs. In most cases the attractions of an overseas qualification, instruction in English and relative low costs have driven an expansion of this sector in countries such as Malaysia since the mid 1990s.

The Malaysian market experienced significant growth with the introduction of private provision in higher education in 1996. This growth was founded on the participation of Chinese and Indian students who were unable to gain places in public providers owing to the allocation of places on a quota system that favored Malay students. However the high growth experienced in the post-1996 Education Act, particularly in private higher education, has moderated and this has shaped the character of the English Language training industry.

The introduction of the principles of meritocracy and the scrapping of the quota system has led to a drop in demand in private colleges from Chinese and Indian students who can now access the cheaper public system. This shrinkage in the market has seen some smaller shop front operators amalgamate into larger hybrid enterprises.

Another recent development has been the introduction of legislation restricting university entry to those who have completed form 6. Private shop front colleges have been hit by this and have

responded with the development of "foundation years", which has been used as a de facto English language program.

The Teacher Labour Market

At the same time there has been changes in the organisational structures of the international English language market there is also changes in the employment of English language teachers. There has also been strong growth in the competition for proficient English language teachers. The demand for teachers is strong in areas where there has been high demand for English and includes Taiwan, China, Hong Kong and Thailand.

The demand for teachers involved in these major cities relates strongly to employment markets where there is significant demand for English language speakers. Malaysia has also been subject to this demand for proficient English teachers and this has seen the emergence of mobile workforce capitalising on the sellers market where market savvy teachers have been able to play off rival providers to secure better pay and conditions in a highly competitive environment. To meet these shortages in schools the Malaysian government has sought to recruit retired teachers with what is seen as better English proficiency.

In many Asian cities the demand for teachers operates at several levels and includes the recruitment of teachers through agencies who may or may not be qualified. The growth in the market and the demand for teachers has eroded the value of formal and standard EFL and ESL qualifications and seen the development and demand for so called "native speaking teachers". This criteria has been generally applied to speakers of English from Australia, Canada, New Zealand, the United Kingdom, The United States and Ireland and represent the emergence of a racially based employment market as the term "native speaker" tends to be interpreted as a code for "white teachers"(Singh, Kell & Pandian 2002).

The assumption is that such teachers will be superior to non-native speakers even though they may not be trained and for teaching English as a foreign language and may not even have tertiary qualifications. This assumption also fails to account for the multilingual environment that unqualified teachers will work. Multilingual environments will require an awareness and ability in using innovative language teaching methodologies that untrained people will generally not possess.

In Malaysia, particularly in the private colleges have hired staff who have retired been compulsorily retired from the public university and school system and provide a significant boost in expertise in a system where there is a growing anxiety about standards.

In countries such as Thailand this option does not exist and expatriate foreigner are highly sought after in a competitive market. Attractions include optional extras on top of salary including accommodation, allowances, school fees etc. These salary options have the effect of creating a differential between local teachers who are "non-native speakers" and expatriates and often negates opportunities for collaborative approaches to multilingualism.

English Language providers in many cases find this inadequate as the turnover of staff, many who work on short term contracts is high, and long term qualified staff are in many places hard to recruit and retain. In addition providers have had difficulty maintaining consistent and professional standards with a "back packer" workforce with variable commitment to their work as English language teachers. Overall the pattern of staffing, particularly in private institutions, has been characterised by rapid turnover as teachers move to better opportunities. In the public sector universities the narrow career options for language teachers also contributes to a mobile workforce.

In this sellers market providers have to look at curriculum products that can be used in an environment of high turnover, limited expertise and diversity of learning needs.

- **New Technologies of Learning**

The products and services emerging in the English Language are responding to several features in that market that have caused the adaptation of new technologies of learning associated with ICT, web based learning and variations on the cyber class room.

- **Human resource problems**

The supply and quality of teachers has created the need for "teacher proof" products and services. In many cases the response to this has been the development of internet and web-based packages and programs. In part the intention is to have more self-directed learning in a text-based environment with teachers being utilized in a "guide" or "facilitation" role.

- **Vocational Programs**

The demand for English services and programs that qualify students for employment and/or migration options has directed providers towards English for vocational purposes with intensive English "front ending" courses with occupational orientations. This has created variations on English for specific purposes programs where English is combined with computer training, business courses and technical programs.

- **Chain and Franchise Operations**

These chains include such organisations as Study Group International with world wide operations have integrated their operations with global travel opportunities and combining courses with packaged tourism. Curriculum in many of these providers is shifting towards interoperability and a more co-ordinated approach to delivery.

This has created a situation where the new technologies of learning offering elements of economy, and the capacity to compensate for teacher supply problems and the need for interoperable programs capable of being delivered in multiple locations. The high capital costs of these ICT platforms suggests that the market will be increasingly characterized by large-scale providers. These include the development of global consortia linking publications, telecommunications, media organization with educational providers.

It is worth considering that Study Groups International is a franchised operation owned by the British newspaper Daily Mail publishing group. These Mega-corporations are key agents in reshaping training delivery by their use of sophisticated forms of electronic information and communication technology (Lepani, 1996; Kenway, 1995). New alliances involving consortia of ELT providers and media giants like Foxtel are also entering the business of educational delivery.

There are questions about the role of these hybrid business ventures as vehicles for privatising public education services and assets. There are dilemmas concerning the tensions between the differential responses in the commercialised context of private sector competition and the requirements of broader responsibilities and accountabilities associated with more traditional public sector roles. The latter was mostly associated with building and nurturing the nation state. These tensions are now emerging in Malaysia where some 360 private providers were approved in 1999. How these new hybrid organisations will manage the tensions between equitable social outcomes across racial and communal groups and their need for profit remains an important question.

This new drive for profitability and the progressive privatisation of the ELT industry has considerable implications for equity that is exacerbated by a digital divide where.

people in the remotest locations will have the potential capacity to be educated through the Internet at a fraction of the cost of traditional methods, having access to the best minds in the world ... while sitting in Nong Khai on Thailand, Kuala Nerang in Malaysia or Phuntsoling in Bhutan. But sadly, many marginalised people will be further marginalised (Ismail, 2000, p. 7 in Singh, Kell & Pandian 2002).

The propensity for the exclusion and marginalisation of many people has much to do with the differentiated nature of the English language market that sees English as access for mobility in a trans-national employment market employment.

Distance education using new technologies are being developed in the hope that it will actually address inequalities in provision by enhancing access and reducing the tyranny of distance. In particular, work-integrated learning programs are being developed for the delivery of flexible learning experiences to the desktops of workers.

The staff and management of large trans-national companies are being recruited on the promise that flexible learning can provide for retraining and up-skilling without the associated costs of travel and subsistence or the loss of productive time. Strategies such as these have become all the more important as the competition in the international marketplace for English language education grows and have made continuous innovation in products and services a driving force. These developments are also changing nature and character of English language teachers of work.

There is a sense of uncertainty and confusion about the changing nature of teaching, knowledge and the institutions in which English is taught; and learnt.

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