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# English Language Education in China Mainland: Quality Assessment in an Uneven Economic Development Country

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<p>The thesis research aims to investigate on the current situation of English Language education in China, identifying and analyzing the quality assessment set by institutions, factors and practices that lead to non-fulfilment within the different education sectors, public and private.</p> <p>The aim of the research is to sketch a range of issues relating to current English education in China that precludes an equal development. Hence, an analysis of the socio-economic situation will attempt to find correlation with aspects that can damage equal educational opportunities.</p> <p>Supported by the collection of statistical data, released by governmental institutions, and the comparison of these with studies by other scholars, it was crucial to alert an undergoing socio-economic disparity in the country. Therefore, the study encourages the idea that consequently to the current uneven economic development, there is also a disparity in the status of English language education among Chinese regions.</p> <p>English language has been, for decades, a tool of study and work for both Chinese inside China and abroad. Some published research has identified a correlation between English education and the economic growth of a country. The thesis research attempts to reflect on this correlation, reporting the facts that support such a statement.</p> <p>Finally, the research supports the idea in which quality is a multi-dimensional matter that occurs within different tiers of educational institutions, besides different forces affecting directly and indirectly the implementation and development of the quality assessment.</p>	
Keywords	English Language teaching, English Language Training, ELT, Market Research, China, Education, Quality Assessment, Economic Growth, Socio-economic, Uneven Economic Development, Inequality, Income Inequality, Education, Market Forces.

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## 1 Introduction

In 1978 Deng Xiaoping, paramount leader of the People's Republic of China at that time, opened up to foreign investment in China and from that year began the transformation from planned economy country to market economy. The economic and political agenda of that time announced an *Open Door* policy, and within that context of development, the promotion of English language was not just a matter of education but also a matter of economic growth for the entire country. From that time to the 1990s, the popularity of English grew rapidly especially in those sectors of the economy dealing with international trade and tourism. As a result of decades of developing growth and aspiration to gain an international stature, today China has the biggest education market per number of students, and in this context foreign language education training, especially English, can take advantage of this growth market. In addition, due to many other factors, such as the admission to the *World Trade Organization (WTO)* in 2001, the hosting of the *Olympic Game* in 2008, and the hosting of the *World Expo* in Shanghai in 2010, the English language training service got an exponential acceleration in different segments. Since 2001, English language is compulsory from elementary school,<sup>1</sup> and part of the *gaokao*, the Chinese national higher education entrance examination, which was recently reformed. In 2010, China became the biggest English Language Training market value reaching 30 billion yuan.<sup>2</sup>

### 1.1 Objectives

The thesis research aims to investigate the English Language education market in China by identifying and analyzing the quality assessment set by institutions, factors and practices that lead to non-fulfilment within the different education sectors, public and private. According to the last *English Proficiency Index (EPI)* released by *Education First* - one of the world leaders of international education - China still retains a low proficiency index score of 49.41 out of 100.<sup>3</sup> Could this be due to a lack in the quality teaching and

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<sup>1</sup> MOE, (2001). *教育部关于积极推进小学开设英语课程的指导意见*, *The Ministry of Education actively promoting guidance on primary school English classes* - 中华人民共和国教育部政府门户网站. Moe.gov.cn. Available at:

[http://www.moe.gov.cn/srcsite/A26/s7054/200101/t20010120\\_166075.html](http://www.moe.gov.cn/srcsite/A26/s7054/200101/t20010120_166075.html)

<sup>2</sup> He, N. (2010). *China Daily*, 2010, *Rush to learn English fuels quality issues*. [online] Chinadaily.com.cn. Available at: [http://www.chinadaily.com.cn/china/2010-08/05/content\\_11098499\\_3.htm](http://www.chinadaily.com.cn/china/2010-08/05/content_11098499_3.htm) [Accessed 18 May 2016].

<sup>3</sup> EF, (2015). *Education First, EF English Proficiency Index - EF EPI-s (for schools)*. [online] Ef.fi. Available at: <http://www.ef.fi/epi/reports/epi-s/> [Accessed 11 Nov. 2015].

the services provided by the institutions? What do the language policy and the education policy say regarding the regulation of quality assurance? How are the public institutions assessed for quality? What about the private English language centers?

## 1.2 Research Problems

The aim of the research is to sketch a range of issues relating to current English education in China, and in particular to find out the main issue with quality assessment within both public and private sectors. Hence, an analysis of the socio-economic situation will attempt to find correlation with aspects that can preclude equal educational opportunities. English language has been, for decades, a tool for study and work for Chinese, both inside China and abroad. Some published research has identified a correlation between English education and the economic growth of a country. Today, there are still limited materials and research about the quality framework assessment in China and this dissertation attempts to establish a clear basis for understanding of the English language training market and provides a supporting fieldwork on the quality matter for further studies. While attempting to answer the main statement of the research question, the following series of sub-questions will function as a guideline for the investigation:

- 1- In the long run China is looking to improve the quality performance of the Education system.

This statement introduces (Chapter 2) the examination of the English language taught in the institutions, the contemporary education policies' situation and changes in China, while attempting to present both internal and external factors that are involved in the improvement of the quality performance in the Chinese education system.

- 2- China is still today a developing economy. What is the general economic situation and what could adversely affect equal opportunities?

This second point (Chapter 3) refers to the analysis of the market based on secondary data divulged by governance institutions. The aim of this market research is to give some basis of understanding of the market with a landscape of some general socio-economic trends, while introducing some of the private vendors operating in the English language training education in different buying segments (Chapter 4).

- 3- Is there a correlation between English Language education and economic growth of China, by whom and how is quality assessment regulated?

This part of the research attempts to investigate the correlation between English language teaching and economic growth (Chapter 5.1 to 5.3). Moreover it aims



to identify the current language policy put in place by the government as guidance for the development of quality standards within the education system.

- 4- Which variables of the market could directly or indirectly affect the quality assurance?

Chapter 5.4 features reflection on the variables that can affect quality assurance.

- 5- In China, quality assurance could be generated directly or indirectly by at least two main players: government and institutions. The market is another player that generates demand for quality. But is that true? How can the market in such exponentially growing demand for English education generate quality?

From Chapter 5.4 to 5.6, to answer this, there is used a previous study based on the dimensions of quality of various grades of education. This attempts to examine the quality assurance and practice of the Chinese education system from the perspective of three major players: government, market, and institutions.<sup>4</sup>

- 6- This final part in Chapter 6 reports the conclusion of the study conducted.

### 1.3 Methodology

The thesis research relies on published quantitative data to analyse the market and qualitative data to analyse the quality assurance. In addition to existing studies, legal documents and reports by international institutions and consulting firms were consulted. The research attempts to sketch out a range of basic quality issues within English language education and investigates the practice of quality assessment by the institutions.

### 1.4 Methodology of the Thesis

The research is divided into six chapters. Chapter 1 introduces the objectives and methodology of the research as well as the background of the topic. Chapter 2 surveys the current situation of China with respect to attempts to improve quality assessment of the education system. A central chapter, Chapter 3, analyses the economic overview and especially inequality, in terms of urbanization and income of the country, as well as acquainting some of the prominent private companies operating in the English language sector, in Chapter 4. Chapter 5 seeks to find a correlation between English language

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<sup>4</sup> Burke, J.C. (2005). *"Achieving accountability in higher education: balancing public, academic, and market demands"*, Jossey-Bass San Francisco, CA, available at: [www.lavoisier.fr/livre/notice.asp?id¼OLSWL6AL3K3OWU](http://www.lavoisier.fr/livre/notice.asp?id¼OLSWL6AL3K3OWU) part in the analysis of Cao, Y. and Li, X. (2014). Quality and quality assurance in Chinese private higher education. *Quality Assurance in Education*, 22(1), pp. 81

education and economic growth. In addition there is an examination of quality assessment, along with the risks that can affect quality assurance. Chapter 6 concludes the thesis with a reflection of the study conducted.

### 1.5 Background

According to the *国家中长期教育改革和发展规划纲要 2010-2020 (Outline of China's National Plan for Medium and Long Term Education Reform and Development, 2010-2020)*, China plans to become a country rich in human resources. The document not only states about the reform to be undertaken by the Chinese government by 2020 but addresses also the issues within the education system still lagging behind the requirements of national socio-economic development and people's demand for fine education.<sup>5</sup> The plan refers to five principles and those are: prioritising development, enhancing the people's abilities from beginning of their education, implementing reforms and innovation, promoting equity, and improving quality. This last principle is one of the main ones carried out in the plan as a core task for the development of the education system. Furthermore, the plan states that the guarantee of the quality of the education should be regulated by State-defined standards for education quality. The document mentions quality in different points, such as that quality should be implemented in various ways including improving the training of teachers and their social status, the proposition of standards state monitor for the quality for compulsory education, and finally a pilot of quality oriented reform.<sup>6</sup> The document outlines general strategic guidelines to be undertaken in the following years but does not describe how these reforms will be adopted. Moreover, the reform seems to be addressed to the public sector, while the private sector, where foreign investment plays a key role, seems to be impacted only indirectly. Today, it could be said that the public institutions within the English education quality assurance are influenced by government mechanisms and policies, while the private institutions are under other external forces related not only to institutions but also to the market. In China, English education providers are influenced by different forces to perform quality assurance and these could be performed by the state in such ways as

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<sup>5</sup> China Gov, (2010). *Outline of China's National Plan for Medium and Long-term Education Reform and Development*. [online] Available at: [http://planipolis.iiep.unesco.org/upload/China/China\\_National\\_Long\\_Term\\_Educational\\_Reform\\_Development\\_2010-2020\\_eng.pdf](http://planipolis.iiep.unesco.org/upload/China/China_National_Long_Term_Educational_Reform_Development_2010-2020_eng.pdf).

<sup>6</sup> MOE, (2010). *National Outline for Medium and Long-term Education Reform and Development (2010-2020)*. [online] China Ministry of Education. Available at: <http://www.moe.edu.cn/publicfiles/business/htmlfiles/moe/s3501/index.html> [Accessed 18 Nov. 2015].

government accreditation, government assessment, and legislation; by the market via demand for quality, accreditation, stakeholders and brand recognition, and finally by institutions themselves via self-monitoring, appraisal, and information disclosure.<sup>7</sup>

#### 1.6 Limitations

The research attempts to identify the research problem of the statement. The current investigation has relied on existing reports and documents released by private, public, local and international institutions, therefore on current knowledge the research appears limited. Part of the reasons for such limitation may be related to the lack of transparency in governance and to difficulties in finding reliable information in China. A range of statistics are published by government institutions and those include aspects of social development, national account, resource investment, education, and many other (see for example *China Statistical Yearbook*). Furthermore other data, however limited, are produced by foreign consulting firms. Due to this limitation, it is foreseeable that private organizations are reluctant to divulge commercially sensitive information.

#### 1.7 Advocacy

The findings of the paper are not provided for decision making but are intended for guidance for any firm or institution involved within English Language Education, and for more rigorous investigation in the future. The selection of the data that describes the project and its surrounding has been subjective. Primary data research is recommended to provide evidence of the current status of quality assurance within the different grades of language education, but the difficulty of data collection and a positive outcome will depend on the organization of the survey and the selection of the sample. Primary data research could be developed in order to investigate deeply within the quality perception of the English language by the consumers and stakeholders within the second tier cities, Tianjin, Chongqing and Hangzhou, since according to secondary data divulged by consulting firms, these appear to be an accessible market with a current lack of major players. Therefore this dissertation should be tested further by conducting additional researches.

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<sup>7</sup> Cao, Y. and Li, X. (2014) a. Quality and quality assurance in Chinese private higher education. *Quality Assurance in Education*, 22(1), pp.65-87. <http://dx.doi.org/10.1108/QAE-09-2011-0061>

## 2 China is looking to improve quality performance of Education System

### 2.1 Introduction

The rapid growth of the national economy has promoted the educational sector to enter a new stage of development. Accordingly, the enrollment rates of various students to schools at all levels have been going up quickly, giving citizens much more access to education, as a result of reforms since 2001.<sup>8</sup> China achieved outstanding results in reducing illiteracy in recent decades, as well as increasing the number of citizens with at least secondary education.<sup>9</sup> In 1986 the law of nine-year compulsory education was passed in China, but the tuition fees were still one of the issues that caused children to drop out of school. Then, since 2006, to ensure that compulsory education was available to all children and students, especially for the less fortunate regions such as rural Western China, students from these areas have been exempted from all school fees. This action was beneficial considering the number of about 200,000 students that went back to school. In 2007, the Chinese government went even further, exempting all rural students nationwide from school fees and ensuring access to textbooks at the expense of the national budget, ensuring in this way education to a total of 150 million students. By 2008, compulsory education in urban areas was also provided for free. In addition, other forms of supporting actions for economically disadvantaged families, such as providing support including living aids, and a national grants system were also put in place to support the students with their studies. These include national grants, national endeavor fellowships, national scholarships, and national student loans.<sup>10</sup> In 2013 in China, the total number of primary schools was 213,529, counting 47,152 in the counties and towns, and 140,328 in the rural areas, and the remaining 26,049 in the cities.<sup>11</sup> In the same year, the *Net Enrolment Rate Of School-Aged Children For Primary Education* reached 99.7 per cent, the *Promotion Rate from Primary School to Junior Secondary Schools* was 98.3 per cent, and from Junior Secondary to Senior Secondary 91.2 per

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<sup>8</sup> Stats.gov.cn. (2015). *China Statistical Yearbook 2014, Chp. 21.7 Number of Entrants of Formal Education by Type and Level*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/zk/html/Z2107E.htm> [Accessed 16 May 2016].

<sup>9</sup> UNESCO, (2008). *National Report Adult Education and Learning in China: Development And Present Situation*. [online] UNESCO. Available at: [http://www.unesco.org/fileadmin/MULTIMEDIA/INSTITUTES/UII/confintea/pdf/National\\_Report\\_s/Asia%20-%20Pacific/China.pdf](http://www.unesco.org/fileadmin/MULTIMEDIA/INSTITUTES/UII/confintea/pdf/National_Report_s/Asia%20-%20Pacific/China.pdf) [Accessed 16 May 2016].

<sup>10</sup> Yang, Y. (2014). UNICEF, *Afford Every Child the Opportunity to a Brighter Future* [online] UNICEF. Available at: [http://www.unicef.org/crc/files/Yang\\_yinfu\\_EN.pdf](http://www.unicef.org/crc/files/Yang_yinfu_EN.pdf)

<sup>11</sup> Stats.gov.cn. (2015). *China Statistical Yearbook 2014, Education Chp. 21.27 Statistics on Primary Schools (2013)*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/zk/html/Z2127E.htm> [Accessed 17 May 2016].

cent. Those data seem to support the idea that the government was, and still is, pushing especially to ensure the success of compulsory education.<sup>12</sup> It is particularly interesting

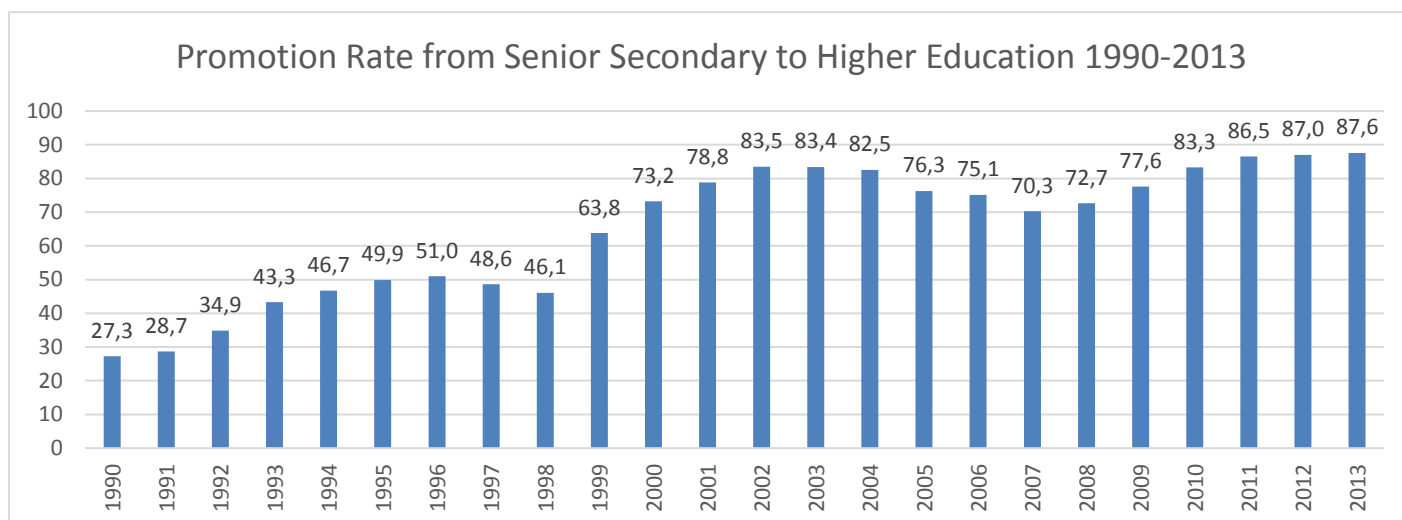


Figure 2.1 (a) Promotion Rate from Senior Secondary to Higher Education 1990-2013<sup>12</sup>

to see the statistical data regarding the rate of promotion from one grade to another and the progress achieved since 1990, especially in the promotion rate from Junior Secondary to Senior Secondary, climbing from 40.6 per cent in 1990 to 91.2 per cent in 2013. Most importantly, the promotion rate from Senior to Higher Education (see Figure 2.1a), that ultimately is indicative of the proportion of people that will be highly skilled.

### Education System In China

Education	School/Level	Grade From	Age
Primary	Primary School	1 to 6	6-12
Secondary	Junior (Lower) Secondary School	7 to 9	12-15
Secondary	Senior (Upper) Secondary/ Vocational Senior (Upper) Secondary	10 to 12	15-18
Post-secondary	Undergraduate Level - Bachelor's Degree	13 to 16	18-22
Post-secondary	Graduate Level - Master's Degree	17 to 18	22-24
Post-secondary	Graduate Level - Doctoral Degree	19 to 21	24-27

Table 2.1 (a) Education System in China<sup>13</sup>

<sup>12</sup> Stats.gov.cn. (2015). *China Statistical Yearbook 2014, Education Chp. 21.29 Net Enrolment Ratio of School-age Children in Primary Schools and Promotion Rate of Graduates of Regular School by Levels*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsjsj/2014/zk/html/Z2129E.htm> [Accessed 17 May 2016].

<sup>13</sup> Baldi, S., (2016), *Education System in China*

The current Chinese regular schooling system consists of three years of pre-school kindergarten, for 3 to 5 years old children, then the nine years of compulsory education that include primary and junior secondary school, three years senior secondary education, and finally post-secondary higher education.

Today government institutions with the *国家中长期教育改革和发展规划纲要 2010-2020* (*Outline of China's National Plan for Medium and Long-Term Education Reform and Development, 2010-2020*) aim to further optimize educational structure, promote the balanced development of compulsory education, improve the quality of higher education and in this way promote a progressive improvement of all citizens' education. China is today making even more effort to get an educational equity as the basic educational policy among all citizens that now more than ever deserve a chance to receive equal education. Moreover, the 2010-2020 plan moves along with the improvement of teachers' professional capacity, including such aspects of contents and methods of teaching, in addition to examination, enrolment and evaluation system that will be further reformed. This means that all operators and institutions of the education sectors will be encouraged to improve their performance level as well.<sup>14</sup>

## 2.2 English in Chinese Education System

Since 2001, English as language is compulsory from elementary school, part of the *gaokao*, the Chinese national higher education entrance examination, and is in most recent years gradually being introduced even earlier into the curriculum in many schools. In 2001, the year of the entrance of China in the *World Trade Organization (WTO)*, the *Ministry of Education (MOE)* issued a circular instructing all universities and colleges to use English as the medium of instruction for certain subjects such as technology, biotechnology, finance, foreign trade, economics and law. The plan by the education commission was to increase the percentage of courses taught in English and to gradually reach the same level of English language proficiency as people of Hong Kong.<sup>15</sup> English language learning has with the years grown in its importance as a language for many purposes, not only academically speaking. One key significance of English is the role that it has in the Chinese national higher education entrance examination (or *gaokao*),

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<sup>14</sup> UNESCO. (2008). *Adult Education and Learning in China: Development and Present Situation*. p.8 [online] Available at: [http://www.unesco.org/fileadmin/MULTIMEDIA/INSTITUTES/UII/confintea/pdf/National\\_Report\\_s/Asia%20-%20Pacific/China.pdf](http://www.unesco.org/fileadmin/MULTIMEDIA/INSTITUTES/UII/confintea/pdf/National_Report_s/Asia%20-%20Pacific/China.pdf) [Accessed 17 May 2016].

<sup>15</sup> Jeffrey, G. and Adamson, B. (2011). *The English language in Mainland China: a sociolinguistic profile*. In *English Language Education across Greater China* p.92. [online] Available at: <https://www120.secure.griffith.edu.au/rch/file/1e1f8dbe-673d-f590-7032-66b9b8a4a15b/1/04Chapter3.pdf> [Accessed 19 Jun. 2016].

which, according to state news agency *Xinhua*, in this year 2016 is taken by 9.4 million students, tested in three compulsory subjects that include Chinese, mathematics and English, plus science and some other humanities subjects of choice.<sup>16</sup> A high score in the *gaokao* is seen as a key to success in Chinese society because it allows students to be admitted to top-tier institutions and gives better long term prospects. Because of the crucial importance of English in the *gaokao*, and so in the life of each Chinese student, parents across the country invest in early English education for their children to give them basis for future educational advantage. For this reason the expectation that children should become familiar with English before ever attending primary school has spread and increased in the last years. This can be seen especially in the main cities of China, and nowadays this trend is growing to the tier two cities and gradually with government reforms it is aimed to increase also in other areas of China. On the mainland private education is growing, and especially English kindergarten schools are spreading in the country. Although the importance of English education becomes more and more crucial for the future of students and the development plan of China, as it will be possible to discover in Chapter 3, inequality between provinces could undeniably affect this trend, meaning that English education could be still reserved for some social class around the country.

### 2.3 Quality Curriculum Standards

The *Ministry of Education (MOE)* is the government organ that draws up strategies, policies and plans for educational reform and development. The *MOE* takes charge of the coordination and management of education at various levels, and it is the organ setting up law, policies, regulations, guidelines, reforms and quality standards.<sup>17</sup> In 2011 a new set of *义务教育英语课程标准, Compulsory English Curriculum Standards*, implemented by the *MOE* aimed to satisfy the social and economic development of the country with higher quality requirements in education, moreover to be able to expand the scale of recruiting international students and meet their demands for quality education. According to scholars' opinions and in line with this philosophy, new reforms and guidelines are crucial to enable an improvement in an outdated education system.

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<sup>16</sup> Xinhua, (2016). *9.4 Mn to sit for gaokao - Xinhua | English.news.cn*. [online] News.xinhuanet.com. Available at: [http://news.xinhuanet.com/english/2016-06/06/c\\_135417085.htm](http://news.xinhuanet.com/english/2016-06/06/c_135417085.htm) [Accessed 19 Jun. 2016].

<sup>17</sup> MOE, (2016). *Ministry of Education of the People's Republic of China. The Responsibilities of the Ministry of Education* [online] en.moe.gov.cn. Available at: [http://en.moe.gov.cn/About\\_the\\_Ministry/What\\_We\\_Do/2011http://en.moe.gov.cn/About\\_the\\_Ministry/What\\_We\\_Do/201506/t20150626\\_191288.html](http://en.moe.gov.cn/About_the_Ministry/What_We_Do/2011http://en.moe.gov.cn/About_the_Ministry/What_We_Do/201506/t20150626_191288.html) [Accessed 20 Jun. 2016].

Foreign language courses' quality set must meet the development needs, mental and emotional attitudes of students as well as of teachers. Government institutions aim through education not only to answer to expectation and to the development of future graduates, but also to meet the country's economic demand for more and more skilled personnel. English is the main foreign language to be learnt beginning in elementary school, and it is even offered in pre-education in some country areas because parents strive to give their children an advantage in English skills at early age. The main purposes of *Compulsory English Curriculum Standards* are to establish a new education teaching philosophy with curriculum contents, and a flexible system of course objectives, in order to raise the instructive level of English teaching. In addition other assessments are intended to support a more open English curriculum evaluation system and evaluation of teaching, while guaranteeing smooth implementation of the English curriculum.

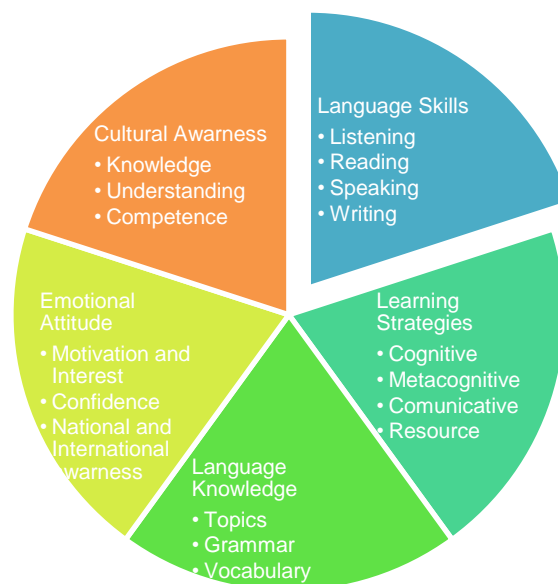


Figure 2.3 (a) English Curriculum Objectives <sup>18</sup>

*Compulsory English Curriculum Standards* are based on five core objectives such as language knowledge and language skills, for a comprehensive basis of language proficiency, learning strategies, to improve learning efficiency, cultural awareness, to guarantee awareness and competences of cross cultural communication, and emotional attitudes, as factors that affect the student learning and development. The English

<sup>18</sup> Beijing Normal University, (2011). *义务教育英语课程标准2011年版*, *Compulsory English curriculum standards 2011 edition*. p.9. [online] 北京师范大学, Beijing Normal University. Available at: <http://www.being.org.cn/ncs/2011/义务教育英语课程标准2011年版.pdf> [Accessed 21 Jun. 2016]. [Accessed 20 Jun. 2016].



curriculum divides English learning into nine different levels. The first five levels are used from primary school to middle school, while levels six to nine are standards from senior high school, which can be also found in the *高中英语新课程标准, New High School English Curriculum Standards 2011*.<sup>19</sup>

Grade	Levels	Vocabulary	Phrases and Idioms	Reading
Primary School	Level 2	≈ 600-700	50	
Junior High	Level 5	≈ 1,500-1,600	200-300	150,000
Senior High	Level 7	≈ 2,400-2,500	300-400	230,000
Gaokao required	Level 8	≈ 3,000	400-500	300,000
	Level 9	≈ 4,500		

Figure 2.3 (b) Summary of Knowledge Target English Language, adapted from Liu, Y.<sup>20</sup>

Language skills, one of the five curriculum objectives, include listening, speaking, reading and writing skills. The English curriculum sets several knowledge targets of the language at each level and aims to enhance the skills of each student through a number of comprehensive activities that should develop their cognitive, listening, reading, and communication abilities, speaking and writing. The MOE's intention with the implementation of new English language curriculum lies in improving teaching and learning in the classroom, giving emphasis on improving language teaching and learning standards. The implementation of the new curriculum into the Chinese education system and classroom comes with pluses and minuses alongside.

<sup>19</sup> MOE (2011). Ministry of Education of the People's Republic of China. *English curriculum standards*. Beijing: Beijing Normal University Press. 教育部, 英语课程标准, 实验稿, 北京师范大学. Available at:

[http://www.hbxggz.cn/uploadfile/year\\_11/day\\_110921/201109212102404869.doc](http://www.hbxggz.cn/uploadfile/year_11/day_110921/201109212102404869.doc)  
[Accessed 19 Jun. 2016]

<sup>20</sup> Liu, Y. (2009). *The current situation and issues of the teaching of English in China*, p.12. [online] 山西師範大學出版社, Publication Bureau of Shanxi Normal University. Available at: [http://www.ritsumeai.ac.jp/acd/re/k-rsc/lcs/kiyou/pdf\\_21-2/RitsIILCS\\_21.2pp7-19LIU.pdf](http://www.ritsumeai.ac.jp/acd/re/k-rsc/lcs/kiyou/pdf_21-2/RitsIILCS_21.2pp7-19LIU.pdf) [Accessed 20 Jun. 2016].

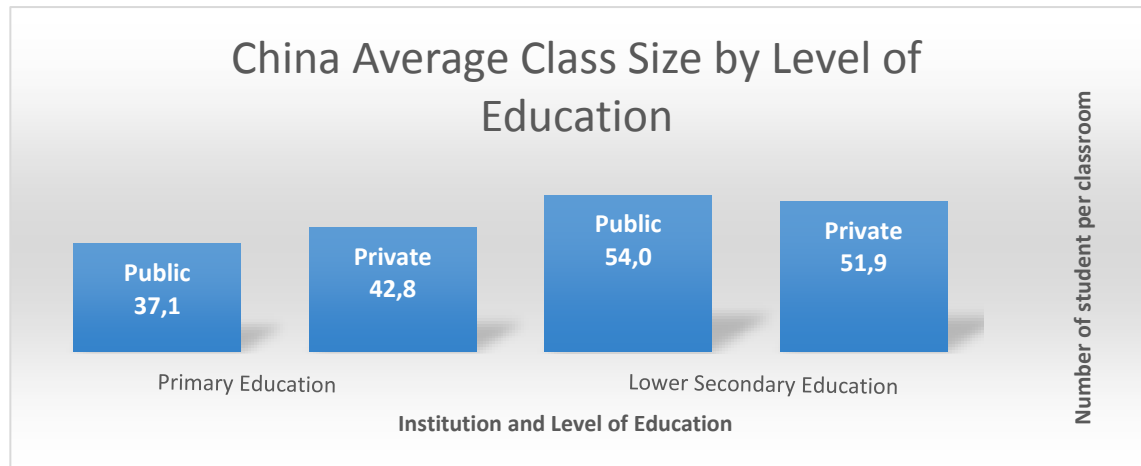


Figure 2.3 (c) China Average Class Size by Level of Education <sup>21</sup>

Some minus on the learning process could be due to the low number of weekly hours dedicated to English teaching that till Grade 6 are three,<sup>22</sup> while the size of classroom by number of students makes questionable the effectiveness of learning development as compared to that intended by the English curriculum standards (Figure 2.3 c). Debates are still occurring as regards challenges and practices such as these that may affect the achievement of teaching and learning of English in China.

#### 2.4 WTO Entrance and Influence in China's Education System

In 1978 Deng Xiaoping, paramount leader of the People's Republic of China at that time, opened up the country to foreign investment and thereby began the transformation through reforms from central planning to market economy. In the same philosophy China's entry into the *WTO* in 2001 represented a second time that China opened to the world. The entire country's economic development started in the following years to see growth. On the other hand China was committed to open the market also of its educational services. The Chinese government needed to meet the requirements of the *WTO* by implementing policy and law in order to become more open and transparent especially in the regulation and management of Chinese-foreign cooperation in running schools. Consequently, foreign companies had permission to deliver educational

<sup>21</sup> OECD, (2012). *How many students are in each classroom? Education at a Glance 2012*. [online] Available at: <http://www.oecd-ilibrary.org/docserver/download/9612041ec025.pdf?expires=1466498567&id=id&accname=guest&checksum=D8B59A1F5AD3B964B64F3281C65F4E37> [Accessed 21 Jun. 2016].

<sup>22</sup> Qi, G. (2016). The importance of English in primary school education in China: perceptions of students. *Multilingual. Ed.*, [online] 6(1). Available at: <http://multilingual-education.springeropen.com/articles/10.1186/s13616-016-0026-0#CR30> [Accessed 21 Jun. 2016].

services and so to open schools at the primary, secondary, tertiary and adult education levels.

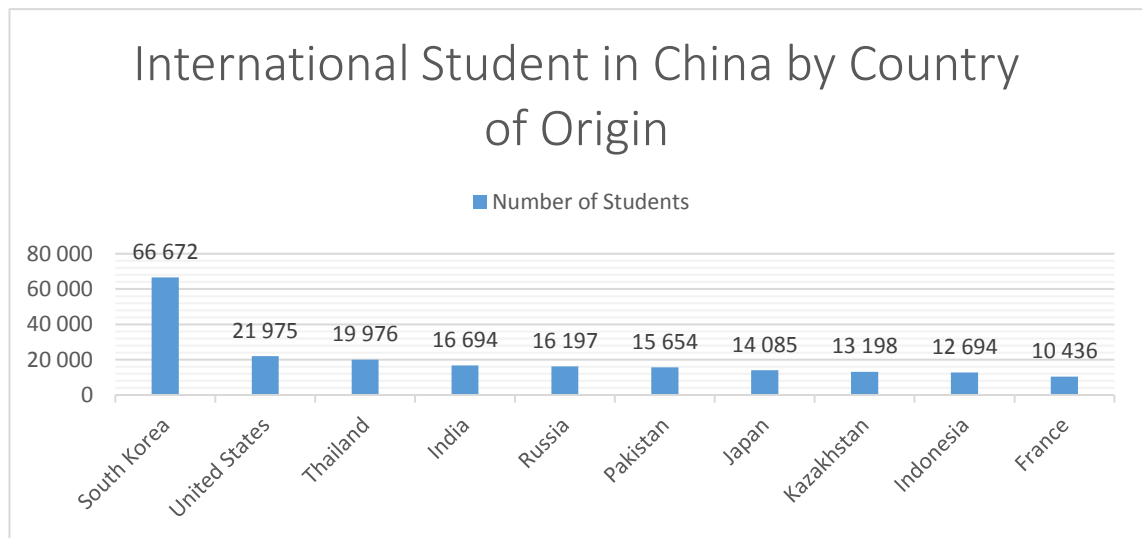


Figure 2.4 (a) International Students in China by Country of Origin in 2015<sup>23</sup>

Not only foreign companies entered in market, but also international students gradually started to enrol and study in China, generating a yearly increase in terms of numbers and range of countries of origin. Although a great number of foreign students are self-funded, the 49,792 African students that represent 12.52 per cent of countries of origin come to China as result of the government scholarship program.<sup>23</sup>

<sup>23</sup> MOE, (2016). *China releases report on foreign students for 2015 - Ministry of Education of the People's Republic of China*. [online] En.moe.gov.cn. Available at: [http://en.moe.gov.cn/News/Top\\_News/201604/t20160420\\_239196.html](http://en.moe.gov.cn/News/Top_News/201604/t20160420_239196.html) [Accessed 23 Jun. 2016].

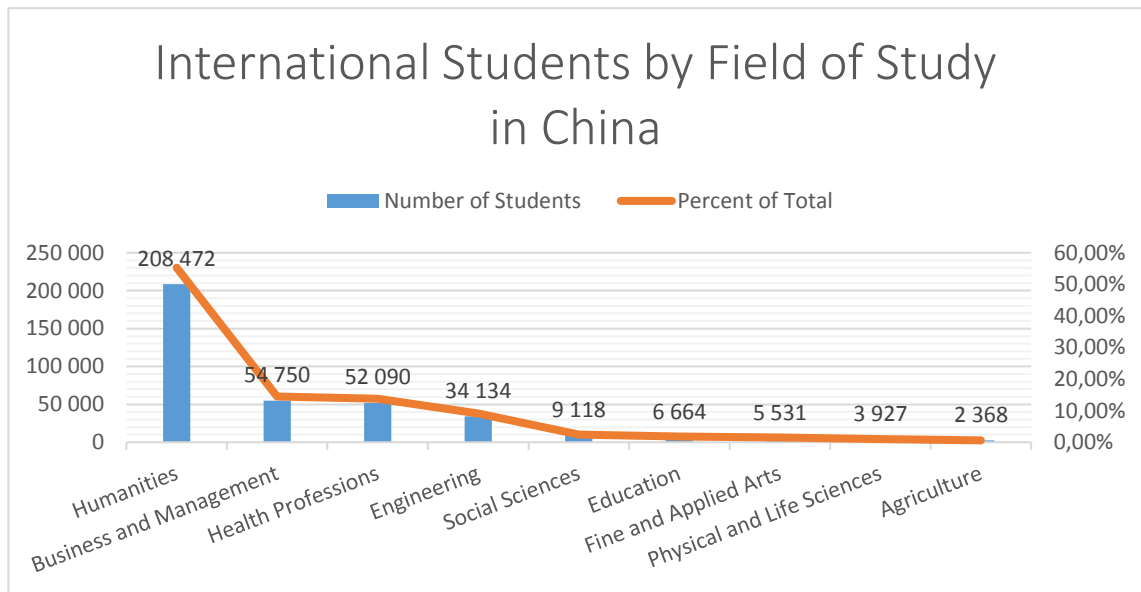


Figure 2.4 (b) International Students by Field of Study in China 2014<sup>24</sup>

24

Also of interest are data regarding the distribution of enrolments by fields of study and educational levels here above reported (Figure 2.4 b). Since China's admission into the *WTO*, the *MOE* has taken regulatory measures in order to further supervise the Chinese-foreign joint venture schools, improve their quality, and promote the cooperation between the parties involved. The entry added several impact also on the total national expenditure on education inputs that in 2014 recorded a total expenditure of 3.280646 trillion yuan, an increase of 8.04 per cent over the previous year of 3.036472 trillion yuan.<sup>25</sup>

<sup>24</sup> Institute of International Education. (2015). *International Students in China*. [online] Available at: [http://www.iie.org/Services/Project-Atlas/China/International-Students-In-China#.V2q0K\\_I9600](http://www.iie.org/Services/Project-Atlas/China/International-Students-In-China#.V2q0K_I9600) [Accessed 22 Jun. 2016].

<sup>25</sup> MOE, (2015). 2014年全国教育经费执行情况统计公告 - 中华人民共和国教育部政府门户网站, 2014 Funding for the Implementation of the National Education Statistical Bulletin. [online] Moe.gov.cn. Available at: [http://www.moe.gov.cn/srcsite/A05/s3040/201510/t20151013\\_213129.html](http://www.moe.gov.cn/srcsite/A05/s3040/201510/t20151013_213129.html) [Accessed 23 Jun. 2016].

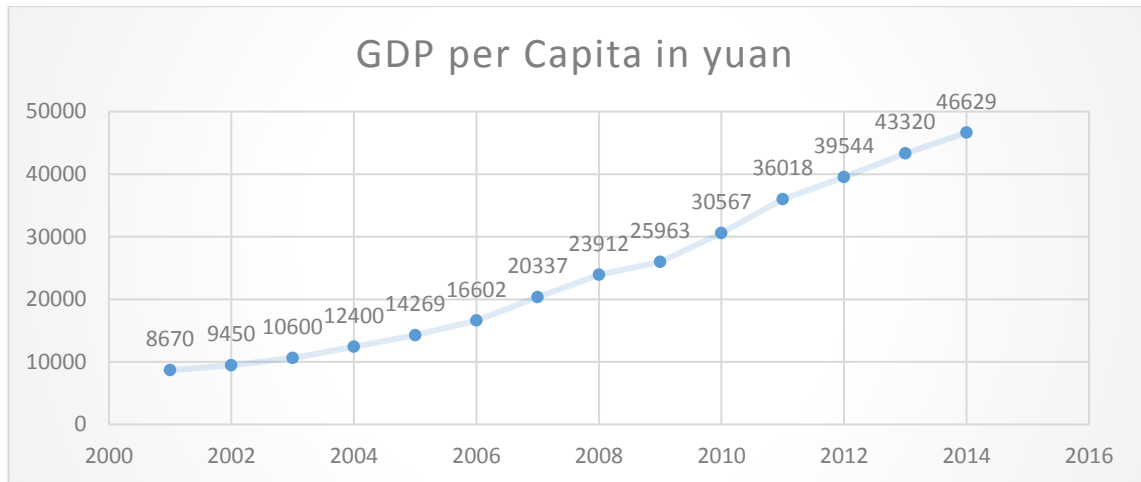


Figure 2.4 (c) China's GDP per Capita in yuan <sup>26</sup>

Subsequent to its *WTO* entrance China enjoyed rapid economic growth, while it is undeniably visible in statistical reports that the average income of households has shown a significant upward trend. In 2001 China's per capita GDP was 8,670 yuan, while in 2014 it was 46,629 yuan. The economic growth of the country coincided also with a more gradual growth in households' income. Following the 2001 entrance and with educational reforms and policies, previously discussed (section 2.1 above), China achieved its nine years of compulsory education, with the result of increasing the demand for education at every level in terms of quantity and number of students. As a result, the demand for education has changed from quantity to quality, where people, no longer satisfied with general enrolment opportunities, demand higher quality education. This is reflected specifically in school selection at any level of the education system. In higher education because of the limitation due to the *gaokao*, or of the lack of education curricula of institutions that do not satisfy the needs of students, but also to the opportunity offered by the open door, there has been recorded a gradually increasing trend of Chinese students deciding to go overseas to gain high education.

<sup>26</sup> Stats.gov.cn, (2016). *China Statistical Yearbook 2015*, Chp. 3.1 *Gross Domestic Product*. [online] China Statistical Yearbook 2015. Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/zk/html/Z0301E.htm> [Accessed 23 Jun. 2016].

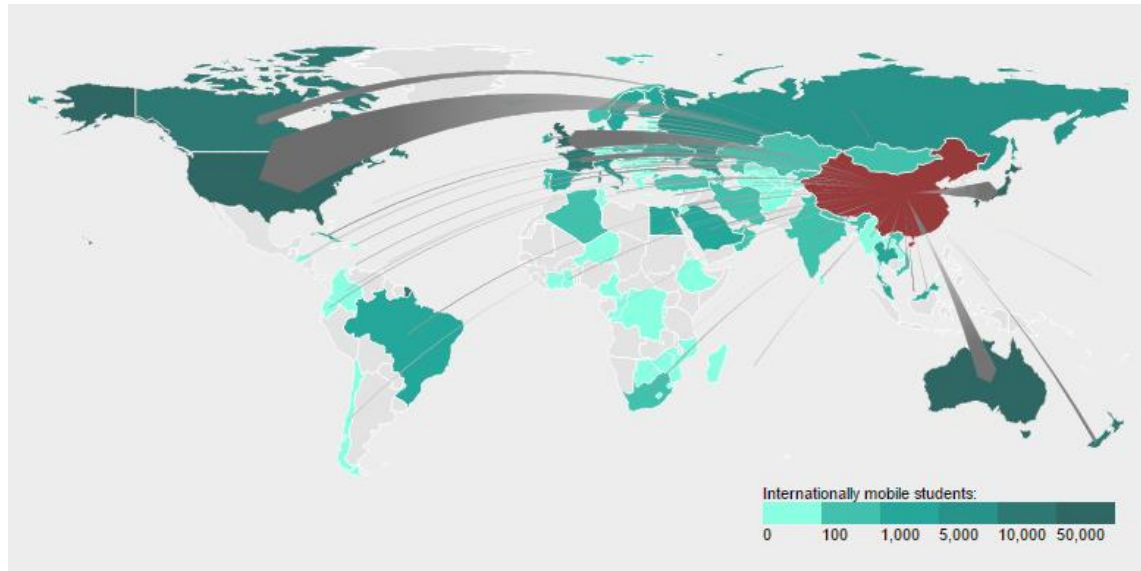


Figure 2.4 (d) Chinese Students' Flow<sup>27</sup>

27

In 2016, the *UNESCO Institute for Statistics* reported that Chinese students studying abroad amounted to 712,157 including as the most common destination countries the United States, with 260,914 students, Australia, Japan, United Kingdom, South Korea, Hong Kong, France, New Zealand, Macao, and Italy. The admission to the *WTO* exposed China to various socio-economic aspects that needed to commit and respond to international standards. At the same time also education system was committed to implement reforms and standards to improve aspects such as quality. Scholars argued that the lack of autonomy, transparency, and flexibility on local and institutional levels can affect the quality of education, while mismatching the supply of education and so the development of skills demanded by the labour market.<sup>28</sup> In addition there are other aspects that affect the development and guarantee of equal opportunities in the country. Although the accession to the *WTO* had registered an exponential economic growth of the country, this brought prosperity only to a part of the country and in the hands of the few. As analysed in Chapter 3, still today there are observable widening gaps between provinces and between rural and urban households' incomes. These gaps are reflected also in the differences in per capita expenditure for education, still low, that for urban

<sup>27</sup> UIS, UNESCO, (2016). *Global Flow of Tertiary-Level Students*. [online] Uis.unesco.org. Available at: <http://www.uis.unesco.org/Education/Pages/international-student-flow-viz.aspx> [Accessed 23 Jun. 2016].

<sup>28</sup> Ding, X., Yue, C. and Sun, Y. (2009). *The Influence of China's Entry into the WTO on its Education System*, *European Journal of Education*, Vol. 44, No. 1, 2009, Part I. p.17 [online] European Journal of Education. Available at: <http://onlinelibrary.wiley.com/doi/10.1111/j.1465-3435.2008.01367.x/pdf> [Accessed 22 Jun. 2016].

households' expenditure is 2,142.3 yuan, while the rural households' expenditure is 859.5 yuan.<sup>29</sup> Another aspect to be considered is that the education finance system is tied up locally, and may further deepen inequality in the country. This could consequently present a serious challenge with respect to the allocation of public educational resources.

## 2.5 13th Five Years Plan

Recently the *5th Plenary Session of the 18th Communist Party of China* looked forward to diversify the economic growth emphasizing more to quality over quantity. Innovation is one of the other development ideas, primarily as a driver of economic development and to shift China's economic structure into a higher-quality growth pattern.<sup>30</sup> The *13th Five Years Plan (FYP)* blueprints containing the country's social, economic, and political goals for the years upcoming, suggests that the service sector in particular, which has huge growth potential, might be ready for more opened foreign investment. This could impact different sectors such as medical, service, finance, and with them education.<sup>31</sup> The *13th FYP* on education aims to deepen reform and promote the modernization of the educational system, and encourages the non-governmental sector to invest in education. For its part the government will accelerate development of education in urban and rural area, especially in the central and western provinces for the next five years, while teacher working conditions, remuneration, and working life will be reevaluated. Moreover the teaching facilities will be improved in schools for compulsory education especially in the poor areas of the country.<sup>32</sup> Although improvements have been made in the last decades, the concept of education in China, in terms of curricula and methodology, are relatively outdated. There are several other challenges that can affect reform to be effective such as shortage of innovative and versatile teachers, unevenly distribution of educational resources among the provinces national wide, unequal opportunities due to inequality of income of rural and urban households, and national educational funding that may be not able to keep up with the demand. While with the

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<sup>29</sup> Stats.gov.cn. (2016). *China Statistical Yearbook 2015, Chp. 6.7 Per Capita Income and Consumption Expenditure of Urban Households and Chp. 6.12 Per Capita Income and Consumption Expenditure of Rural Households*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2015/indexeh.htm> [Accessed 23 Jun. 2016].

<sup>30</sup> APCO, (2016). *The 13th Five-Year Plan: Xi Jinping Reiterates his Vision for China*. [online] Apcoworldwide.com. Available at: <http://www.apcoworldwide.com/docs/default-source/default-document-library/Thought-Leadership/13-five-year-plan-think-piece.pdf?sfvrsn=2> [Accessed 23 Jun. 2016].

<sup>31</sup> Harjani, A. (2015). China's 5th Plenum: 5 things you need to know. [online] CNBC. Available at: <http://www.cnbc.com/2015/10/22/chinas-fifth-plenum-5-things-you-need-to-know-about-beijing-policy-meeting.html> [Accessed 20 Nov. 2015].

<sup>32</sup> Xinhua, (2016). *China to deliver five-year plan on education*. [online] Chinadaily.com.cn. Available at: [http://www.chinadaily.com.cn/china/2016-03/09/content\\_23801798.htm](http://www.chinadaily.com.cn/china/2016-03/09/content_23801798.htm) [Accessed 23 Jun. 2016].

*13th FYP* the Chinese government will adopt reform for the development of the quality of the education system in the public education, the private sector could lack this emphasis. With the multi players in the private education service, competitiveness in the research of new costumers moves companies to select strategies that may give more emphasis on price leadership, affecting in this way the quality outcome. Based on personal experience, from 2008 to 2015, as a language teacher in different grade schools, and in general seeing the experience of other foreign teachers, it could be said that several kindergartens, generally high schools and private learning centers neglect to apply appropriate screening in the recruitment of foreign teachers. With respect to qualification, no previous language education experience or any teaching certification was asked, although in the market holding those papers is a plus for both teachers and institutions especially when offering language packages or school credentials to students and their parents. This trend is still ongoing especially in the remote areas of China, observing the work offers for English teacher recruitment in social media and Chinese job websites. On the other hand in both public and private sectors, the lack of human resource, moreover lack of competences, motivation, and of training could lead to negative factors that otherwise damage the teaching and learning of English. In this context, recently the government took measures and made clear requirements especially regarding private learning centers and schools that have different control and bureaucracy compared to the public, to check the background of tutors as mandatory and introduce stringent eligibility criteria for teachers, especially in the big cities as Beijing, Shanghai, and Guangzhou where checks are constantly implemented. English teachers are required to have a minimum qualification of bachelor's or a higher degree along with a minimum of related work experience to satisfy the criteria, *TESL* teachers are preferred, with no criminal records, physically and mentally healthy, in addition to being native speakers and preferably from a country such as United Kingdom, USA or Canada.



### 3 China's Socio-Economic Disparity

#### 3.1 Market Research Methodology

This market research is based on an in-depth qualitative analysis and the main objective is to analyse the various aspects of China's market, with a focus on economic disparity, inequality of income, and living conditions of the Chinese population. The qualitative analysis includes various data by the *World Bank*, the *Central Intelligence Agency (CIA)*, whereas other qualitative analysis are based on quantitative analysis conducted by the *National Bureau of Statistics of China (NBS)*,<sup>33</sup> which includes primary interviews and surveys on the national level. The analysis of national economic conditions and other micro and macroeconomic indicators are considered as essential to gain an insight of the general market overview. The research gathers together primary and secondary data to ascertain market indicators and attempts to understand the socioeconomic and socio-political trends in China's Mainland. The data were obtained by a bottom-up and top-down approach, by leveraging market information from various stakeholders such as vendors' websites, consulting experts' papers, and verifying the data against statistical databases produced by national and international organization, and various other secondary sources. In addition, based on these secondary data the research introduces some of the major vendors within the English language training industry that operate in the market, while providing an insight of market buying segments of the companies analysed.

#### 3.2 China Overview



##### Administrative divisions:

22 provinces (省 shěng), 5 autonomous regions (自治区 zìzhìqū), and 4 municipalities (直辖市 zhíxíáshì)

**Provinces:** Anhui, Fujian, Gansu, Guangdong, Guizhou, Hainan, Hebei, Heilongjiang, Henan, Hubei, Hunan, Jiangsu, Jiangxi, Jilin, Liaoning, Qinghai, Shaanxi, Shandong, Shanxi, Sichuan, Yunnan, Zhejiang

##### Autonomous Regions:

Guangxi, Inner Mongolia, Ningxia, Xinjiang Uygur, Xizang (Tibet)

**Municipalities:** Beijing, Chongqing, Shanghai, Tianjin

**Note:** China considers Taiwan its 23rd province; Special administrative regions Hong Kong and Macau

Figure 3.2 China Administrative Divisions

<sup>33</sup> NBS, National Bureau of Statistics of China, <http://data.stats.gov.cn/english/>

China's open-door policy began in 1978, when Deng Xiaoping, paramount leader, admitted foreign investments into China and started the transformation from a centrally-planned economy country to a market-based economy. In recent decades the country has experienced a rapid economic and social development. In regards of this development and with a population of 1.3 billion, China succeeded in lifting millions of Chinese people out of poverty. Although it became one of the largest economies in the world, and overtook Japan in 2010, it is yet categorized as a developing country. Moreover its market and social reforms are still considered by the developed countries' economists and scholars as incomplete.

Consequently, after decades of economic expansion and a tighter labor market, from state reports and other statistical data it can be seen that Chinese residents' income continues to increase. In 2013, from data of the *China Statistical Yearbook 2014*, the per capita total income of urban households was 26,955 yuan, while the rural equivalent was 8,896 yuan, seeing an increase in terms of real growth of 7.0 per cent and 12.4 per cent respectively.<sup>34</sup> Despite this increase there is undeniably visible an income inequality gap between the coast and interior with the middle and western regions of China. This inequality is yet shown by the five group income level, which has also progressively risen over the past two decades<sup>35</sup>. However, it must be mentioned that during the last *5th Plenary* the government unveiled sweeping policy guidelines to narrow the gap between rich and poor, in addition to other policies intended to address major problems that could affect the economic growth of the country. Under this inequality of income in China, what could happen it is that less affluent regions and localities will be not be able to fund any services, while citizens included in specific poor geographic area or level group of income will be less able to afford the cost of living and specifically basic education. As a result this could lead to an increase of inequality in educational outcomes.<sup>36</sup> For this reason

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<sup>34</sup> Stats.gov.cn. (2015). *China Statistical Yearbook 2014, Chp. 6.4 Per Capita Income and Engel's Coefficient of Urban and Rural Households*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/zk/html/Z0604E.htm> and Stats.gov.cn. (2014). *China's Economy Showed Good Momentum of Steady Growth in the Year of 2013*. [online] Available at: [http://www.stats.gov.cn/english/PressRelease/201401/t20140120\\_502079.html](http://www.stats.gov.cn/english/PressRelease/201401/t20140120_502079.html) [Accessed 10 May 2016].

<sup>35</sup> Stats.gov.cn. (2015). *China Statistical Yearbook 2014, Chp. 6.7 Per Capita Disposable Income of Urban Households by Income Quintile*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/indexeh.htm> [Accessed 16 May 2016].

<sup>36</sup> Goh, C., Luo, X. and Zhu, N. (2014). *Income growth, inequality and poverty reduction: A case study of eight provinces in China p.20*. [online] Available at: <http://www.cirano.qc.ca/pdf/publication/2014s-03.pdf> [Accessed 10 May 2016].

economists suggest that the government should support structural forces by increasing the equality of opportunity between coast and inland regions. The stimulation of economic growth of inland regions and the increase of Chinese migrant wages could progressively lead to narrow the income gap between regions. At the same time, rising educational standards, leveraging on equal opportunities, could speed growth in tertiary education that will ultimately increase the numbers of skilled workers, facilitating in this way an increase in the pace of innovation of the country.<sup>37</sup>

### 3.3 Ethno-Linguistics Division in China

The People's Republic of China has fifty-six minorities officially recognized by the Chinese government's division of the country into ethno-linguistic areas. This data is extremely important to define the anthropological and socio-political dynamic, and to have a comprehensive picture before engaging with any aspect of the country. This part of the report aims to help to avoid the oversimplification inherent in relying on artificially drawn-up country borders when it comes to analyzing China's population. Instead, an understanding of such diversity would encourage analysts to interpret any ethnic group data, such as in the *China Statistical Yearbook 2014* report, in a more meaningful and ultimately more useful way. Instead of referring to China as a unique country, it is necessary to understand and examine the population by regions of the Coastal, or Eastern, Central, Western and Northern regions for example, or even by province, and view their distribution across the country.

A general understanding of Ethno-mapping leads also to comprehend how tendencies, like deforestation, water scarcity, and overpopulation, could offer some interesting insights into Chinese people's behaviour. Particularly, how ethnic groups tend to converge in an otherwise ethnically diverse society, how people's lifestyles have changed in the area, what is their income or their consumer behaviour, and what kind of opportunity some areas offer compared to others. The Ethno-linguistic mapping of this report aims to give insight about China, with the ultimate reason to understand the different socio-economic, cultural, and ethnic groups in an area that could help pinpoint different human factors. Specifically in the report, this mapping is intended to contribute to the understanding of inequality factors that will be analysed in the following paragraphs.

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<sup>37</sup> World Bank. (2013). *China 2030: Building a Modern, Harmonious, and Creative High-Income Society*, p.9 [online] Available at: <http://www.worldbank.org/content/dam/Worldbank/document/China-2030-overview.pdf> [Accessed 9 May 2016].

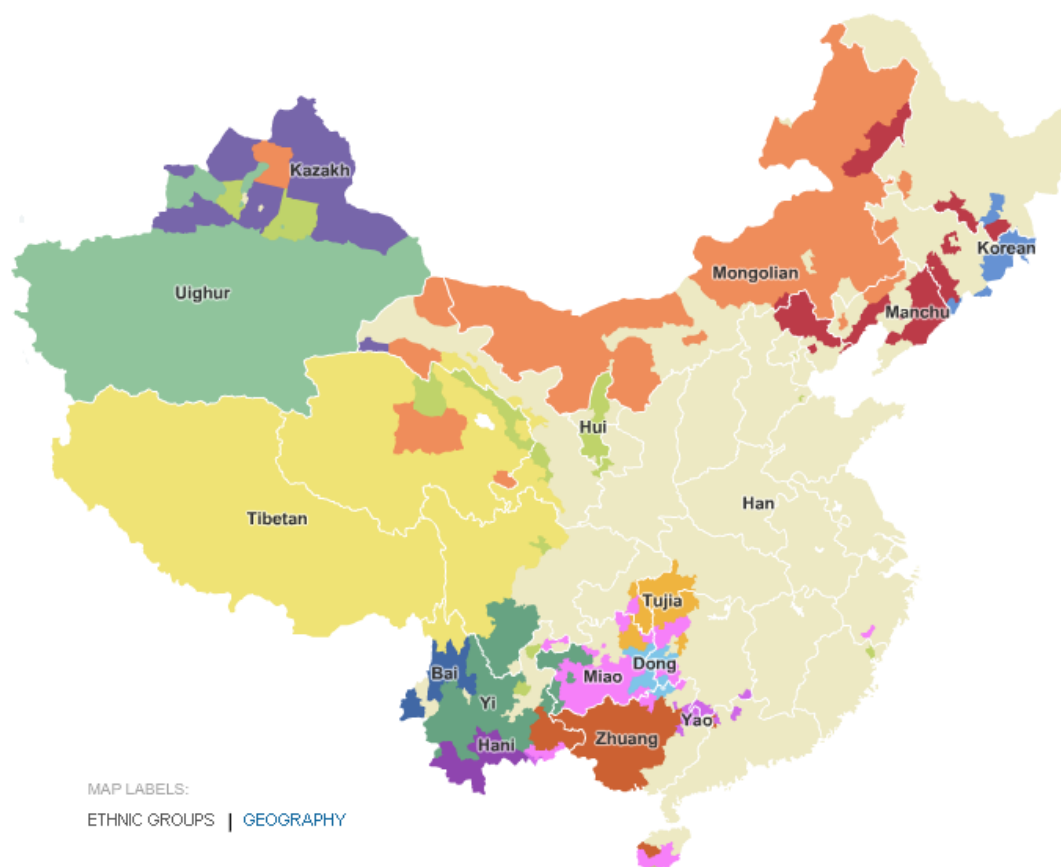


Figure 3.3 (a) Interactive Map of Minorities in China – Areas with minority population of 10% - NYTimes.com. (2009)<sup>38</sup>

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In order to understand China's socio-political and economic factors, it is necessary to understand how the country is populated. The Han ethnic group makes up about 91.51 per cent of China's population according to the 2010 national census.<sup>39</sup> The four most significant areas are Tibet in the southwest, Xinjiang in the northwest, Inner Mongolia in the north, that are also recognized by the Chinese government as autonomous regions, and Manchuria in the northeast, made up of three northeastern provinces. The largest ethnic minorities are Zhuang (16.9 million), Uyghur (11.5 million), Hui (10.5 million), Manchu (10.3 million), Miao (9.4 million), and Yi (8.7 million).

<sup>38</sup> Interactive Map of Minorities in China. The map shows areas with minority of 10 percent. The interactive Map is available at this link <http://goo.gl/4uGH7S>  
Zhou, Y. and Bloch, M. (2009). Interactive Map of Minorities in China - Interactive Graphic - NYTimes.com. [online] Nytimes.com. Available at: [http://www.nytimes.com/interactive/2009/07/10/world/20090711-xinjiang.html?\\_r=3&](http://www.nytimes.com/interactive/2009/07/10/world/20090711-xinjiang.html?_r=3&) [Accessed 23 May 2016].

<sup>39</sup> Wang, G. (2011). *Han Chinese proportion in China's population drops: census data*. [online] News.xinhuanet.com. Available at: [http://news.xinhuanet.com/english2010/china/2011-04/28/c\\_113849933.htm](http://news.xinhuanet.com/english2010/china/2011-04/28/c_113849933.htm) [Accessed 26 Apr. 2016].

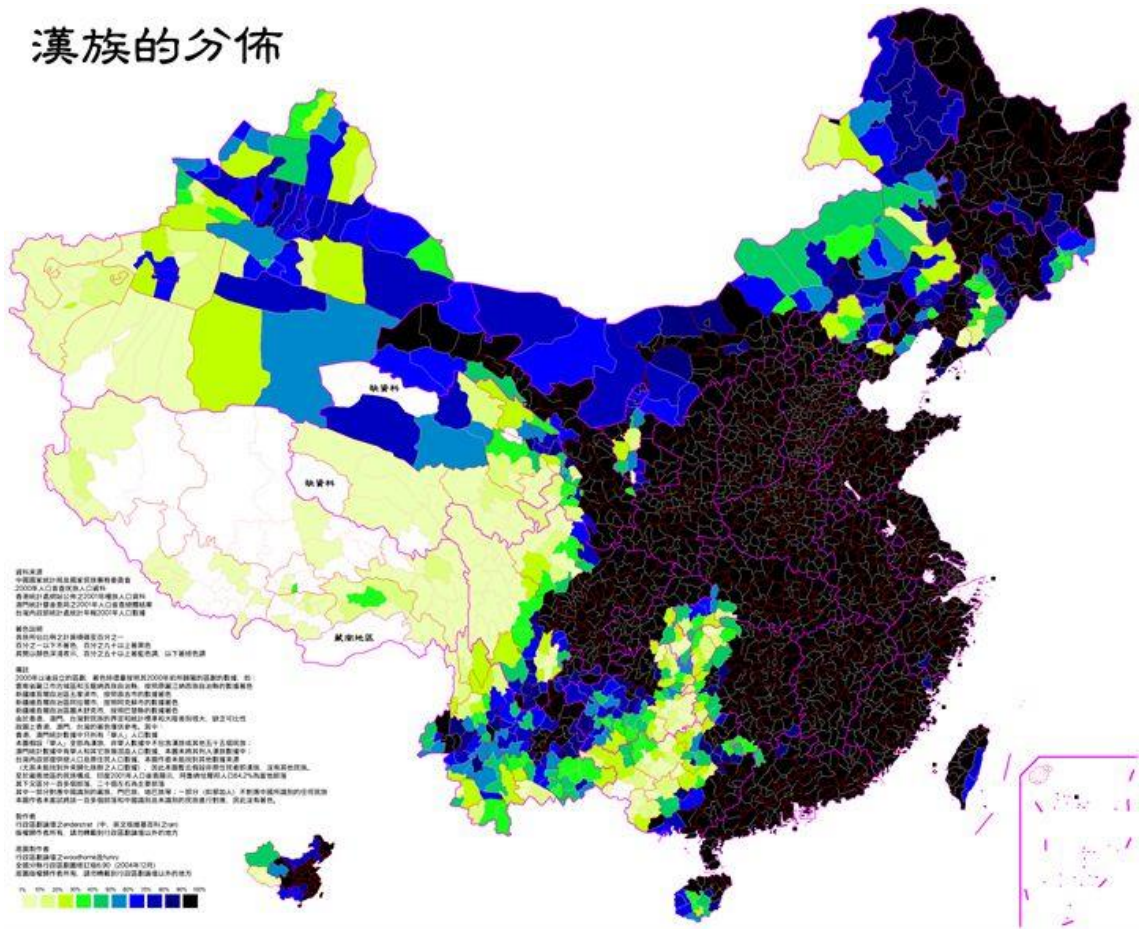


Figure 3.3 (b) 漢族的分佈, Distribution of Han, China National Map <sup>40</sup>

40

The Han, in dark black on the above Figure, is the largest ethnic minority and counts approximately 1.2 billion inhabitants, then the remaining fifty-five minorities count in total 157 million inhabitants.

40 漢族的分佈, 中國民族地圖, Distribution of Han, China National Map, China National Bureau of Statistics and the State Ethnic Affairs Commission National Population Census 2000 data. Distribution performance of minorities with coloured shades [online] Available at: [http://www.360doc.com/content/12/0813/22/276037\\_230028707.shtml](http://www.360doc.com/content/12/0813/22/276037_230028707.shtml) [Accessed 11 May 2016]

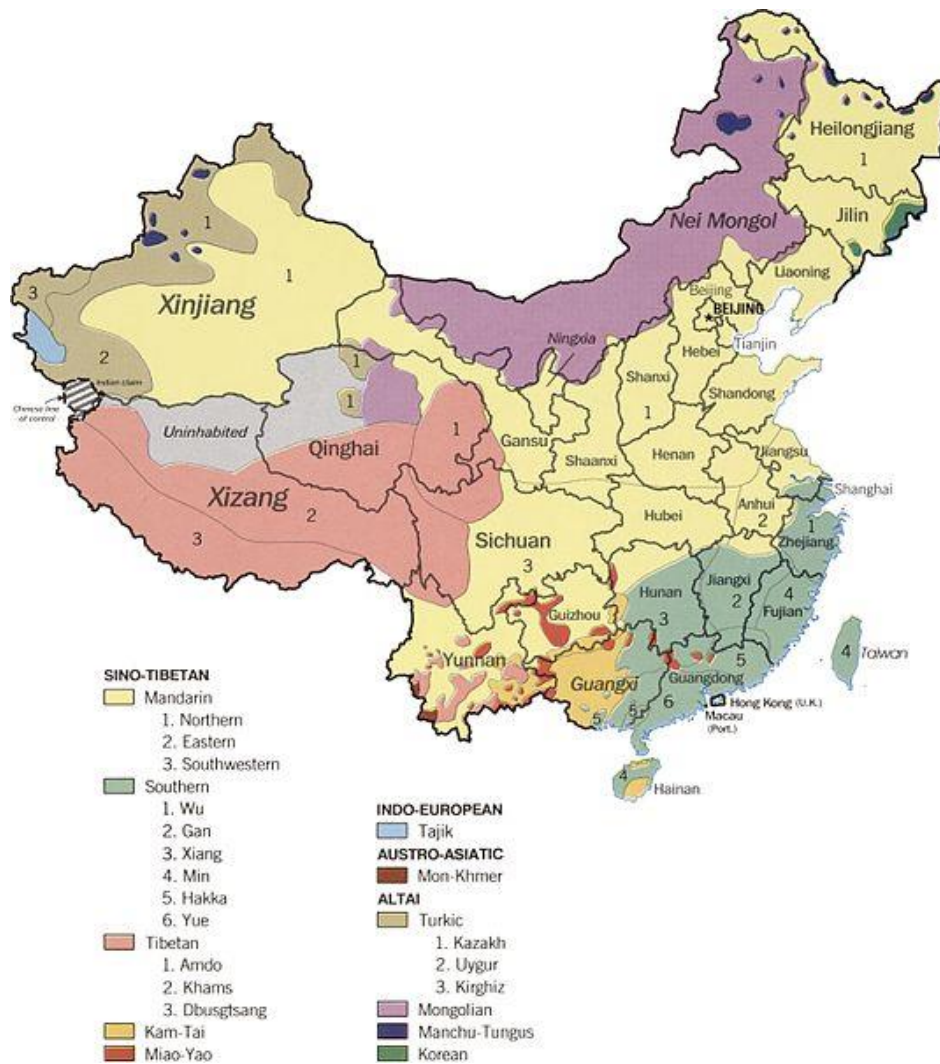


Figure 3.3 (c) China Linguistic Map <sup>41</sup>

41

China is the fourth largest country in the world, and there are multiple varieties of spoken Chinese being used today both within its borders and abroad. Inside the country a multitude of languages and dialects, sometimes unintelligible, that differ morphologically and phonetically, are still today spoken. 汉语 (read Hànyǔ), or Putonghua, a form of Chinese Mandarin, is the predominant language, moreover it is the official national spoken language of the People’s Republic of China mainland and serves as the lingua franca inside the country. 粤语 (read yuèyǔ), Cantonese, is spoken in the south region and counts approximately 55 million speakers in China mainland. Cantonese is also the

<sup>41</sup> Wikipedia. (2012). *China linguistic map*. [online] Available at: [https://commons.wikimedia.org/wiki/File:China\\_linguistic\\_map.jpg](https://commons.wikimedia.org/wiki/File:China_linguistic_map.jpg) [Accessed 11 May 2016].

official language of autonomous regions of Macau and Hong Kong where the Language law of China does not apply (also Portuguese is a spoken official language in Macau and English in Hong Kong).

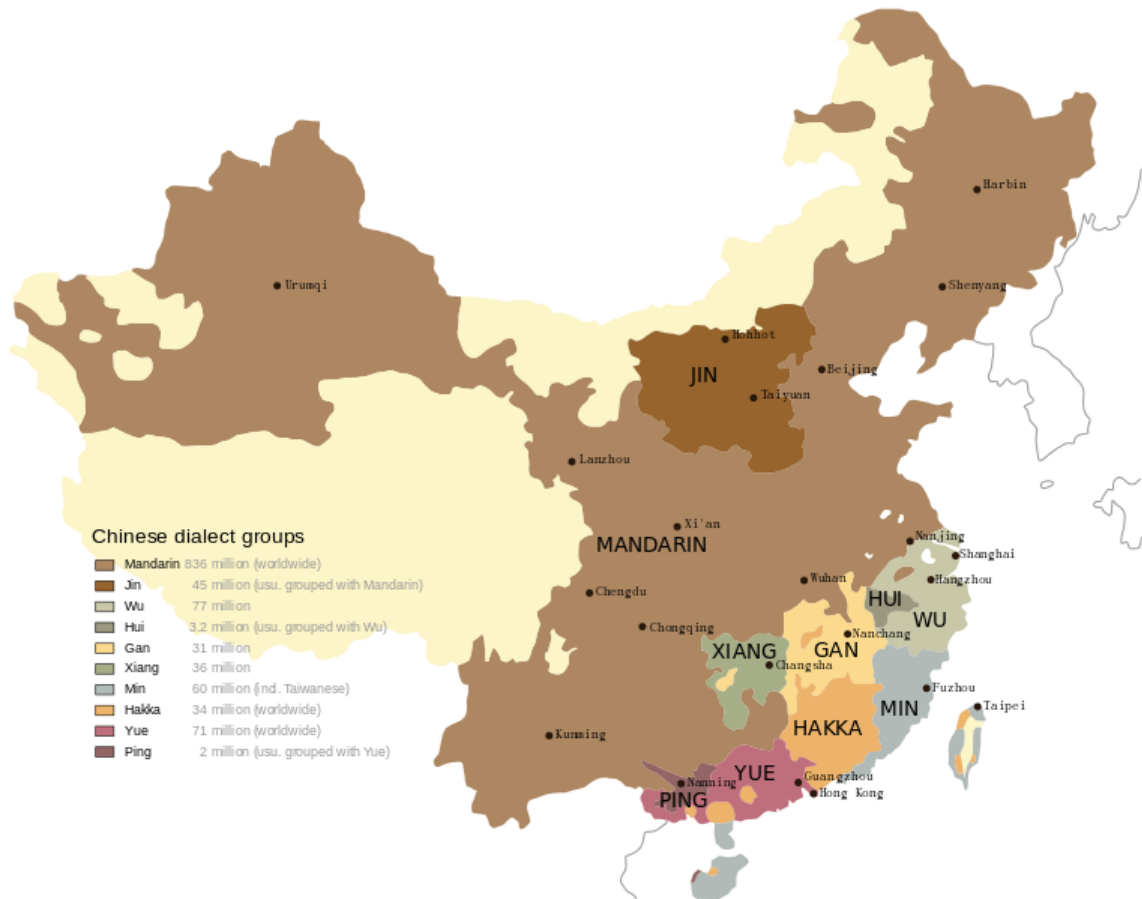


Figure 3.3 (d) Map of Sinitic languages <sup>42</sup>

42

Tibetan and Mongolian languages have official status respectively in the autonomous regions of Tibet and Inner Mongolia. Additionally, the government supports the study of the Uyghur official language in Xinjiang, and Zhuang, official language in Guangxi.<sup>43</sup>

It is important to be familiar with boundaries of China, especially when analysing data, culture, business relations, trades or any other sociological aspects. It is crucial not to generalize all across China because of the kind of networks inside the country could

<sup>42</sup> Commons.wikimedia.org. (2011). *Map of Sinitic Languages*. [online] Available at: [https://commons.wikimedia.org/wiki/File:Map\\_of\\_sinitic\\_languages\\_full-en.svg](https://commons.wikimedia.org/wiki/File:Map_of_sinitic_languages_full-en.svg) [Accessed 11 May 2016].

<sup>43</sup> CIA, (2015). *The World Factbook, Languages*. [online] Cia.gov. Available at: <https://www.cia.gov/library/publications/the-world-factbook/fields/2098.html> [Accessed 13 May 2016].

depend on geographic areas that explain human behaviour, consumption, ways to do business. In this sense in dealing with China it is necessary to reflect on the internal social connection, institutional and organizational changes, and so practices, knowledge, and information for a deep analytical study. At the same time, Western companies interested in having any business with China should be aware that everything is different. For this reason, they should be more open to deal with a variety of situations, and be mindful of the Chinese society that may not share the same values.<sup>44</sup>

### 3.4 Population Density

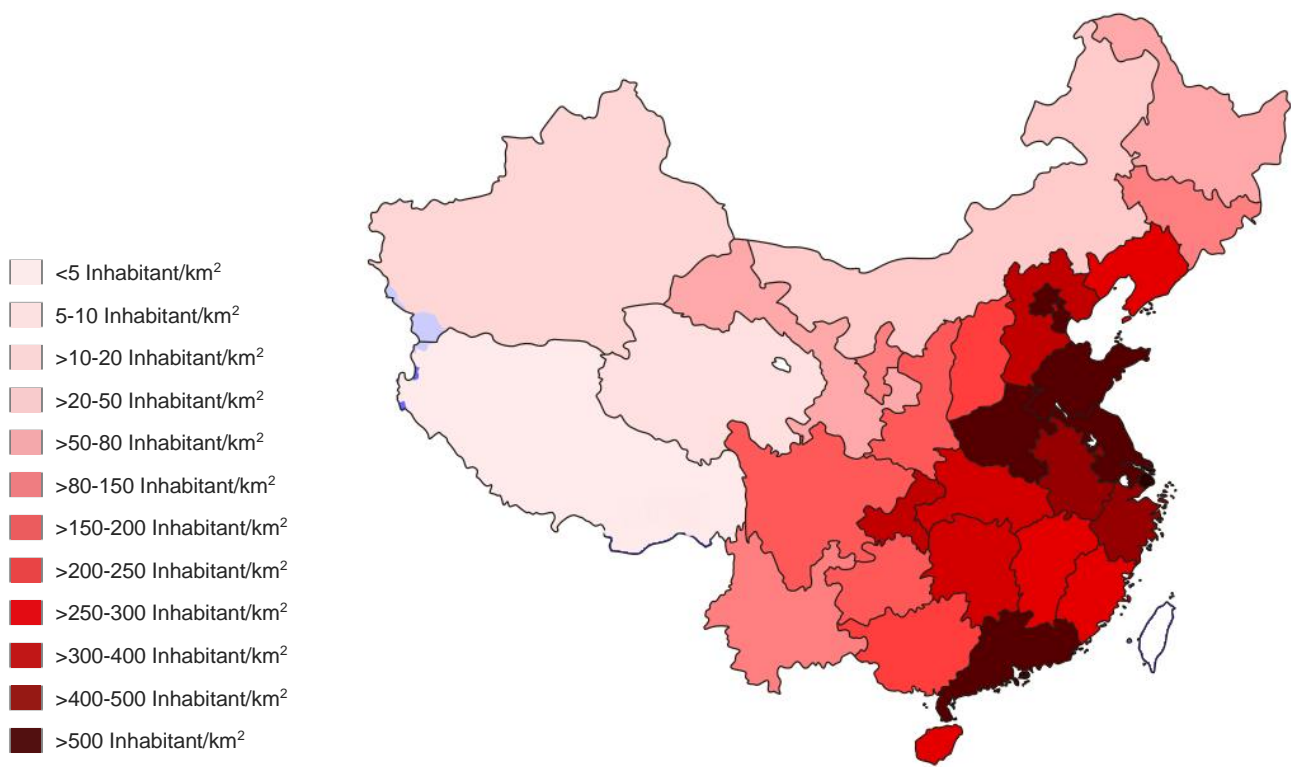


Figure 3.4 (a) Population Density of China, Census 2010 <sup>45</sup>

45

China is the most populous country in the world, with 1.357 billion people in 2016 according to the *World Bank*, one fifth of the world's total (Taiwan, Hong Kong and Macao are not included). The figure above shows the population density of China. According to

<sup>44</sup> Nyíri, P. and Breidenbach, J. (2005). *China inside out: Contemporary Chinese Nationalism and Transnationalism*. Budapest, Hungary: Central European University Press, p.16.

<sup>45</sup> Wikipedia. (2013). *PRC Population Density, Census 2010*. [online] Available at: [https://en.wikipedia.org/wiki/File:PRC\\_Population\\_Density.svg#globalusage](https://en.wikipedia.org/wiki/File:PRC_Population_Density.svg#globalusage) [Accessed 13 May 2016].



*World Bank* data, the national population density counts 145 people per sq. km, although unevenly distributed throughout the country.<sup>46</sup> On the east coast in dark red on the map above (Figure 3.4 a) there are more than 500 people per sq. km; in the inland areas, where rural areas are spread, between 200 and 250 people per sq. km, while in the west area as Tibet counts a low density of less than 5 people per sq. km. This diversity could be explained for the historical access to the water and to the nature geographic of the land, in addition to economic and development reasons. The figure shows in dark red colour also that a high urbanization is occurring, and those areas as Beijing, Shanghai, Tianjin and Guangzhou have become denser.

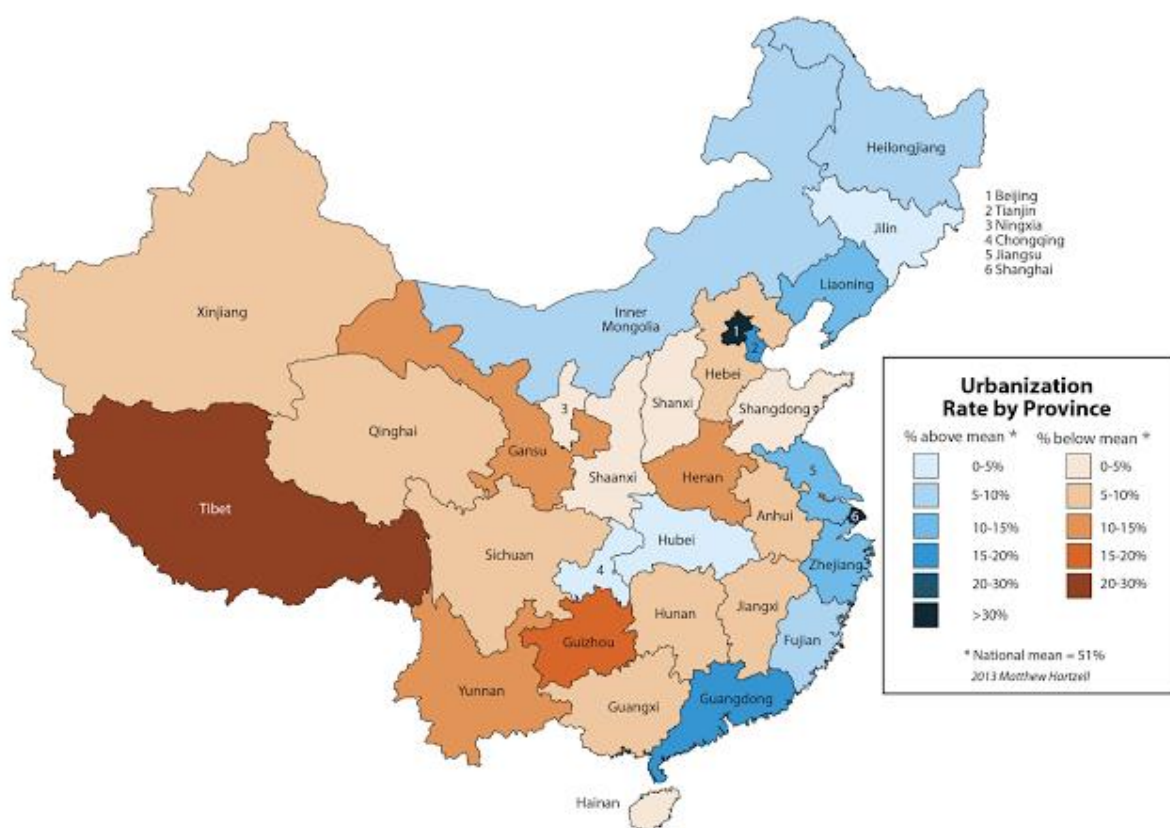


Figure 3.4 (b) Urbanization Rate by Province<sup>47</sup>

47

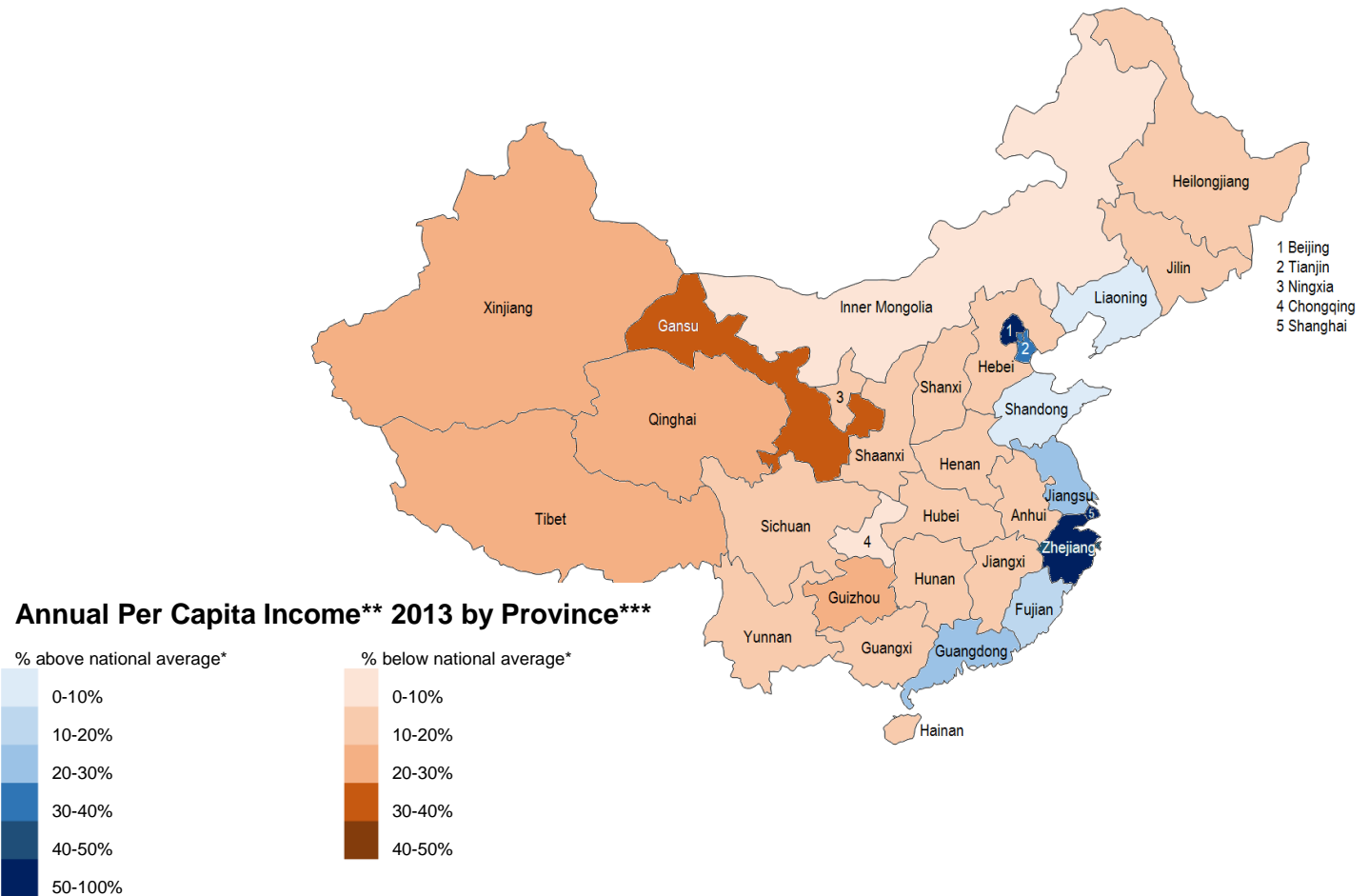
From the above map, there is also undeniably a clear difference between provinces areas. Once again, the coast is characterized by urbanization, in terms of people living

<sup>46</sup> World Bank, (2016). *Population density (people per sq. km of land area) | Data | Table*. [online] Data.worldbank.org. Available at: <http://data.worldbank.org/indicator/EN.POP.DNST> [Accessed 13 May 2016].

<sup>47</sup> Hartzell, M. (2013). *China's Uneven Economic Development* [online] Matthartzell.blogspot.it. Available at: <http://matthartzell.blogspot.it/2013/09/chinas-economic-disparityin-maps.html> [Accessed 14 May 2016].

in cities, above the national mean of 51 per cent. Beijing and Shanghai are even 30 per cent above the national mean. On the coastal area the exception is Shandong province that is still today a rural area, while in the west Tibet is, by far, the least urbanized province.

3.5 Income by province and living conditions



\*National Average 35851.01 yuan (RMB)

\*\* Urban Disposable Income and Rural Net Income combined

\*\*\* China Statistical Yearbook 2014

Figure 3.5 (a) Annual per Capita Income 2013 by Province, adapted from Matt Hartzell, Simone Baldi <sup>48</sup>

<sup>48</sup> Baldi, S. (2016). Figure 3.5 (a), this map is an update of the work by Matt Hartzell but based on China Statistical Yearbook 2014. Hartzell, M. (2013). *China's Uneven Economic Development* [online] Matthartzell.blogspot.it. Available at: <http://matthartzell.blogspot.it/2013/09/chinas-economic-disparityin-maps.html> [Accessed 14 May 2016].

Matt Hartzell<sup>49</sup> in his work *China's Uneven Economic Development* reminds that when comparing any statistical data, in this case income, those are distributed unevenly. The above map (Figure 3.5 a), that collected and adapted data from *China Statistical Yearbook 2014*, shows the *Annual Income per Capita of 2013* distribution. At a first look it can be noticed that the blue areas coincide with the most urbanized and dense areas, in blue and dark red, seen in the preceding paragraph (Figure 3.4 a and 3.4 b). Surprisingly just nine provinces out of thirty-one have a yearly income above the national average of 35,851.01 yuan (RMB) obtained combining the national average of *Annual Disposable Income of Urban Households* with the *Annual Net Income per Capita of Rural Households 2013*. Coloured in dark blue Shanghai is 77 per cent above the national average, followed by Beijing 64 per cent and Zhejiang 51 per cent. The western province with the lowest percentage below the national average is Gansu with 33 per cent, while Qinghai, Tibet, Xinjiang and Guizhou count percentage between minus 28 to 24 per cent. In the inland areas in the middle even though below the national mean the percentages are almost equally spread between minus 19.8 per cent of Ningxia and minus 11 per cent of Jilin, Hubei and Hunan.<sup>50</sup>

### People's Living Conditions

### Aggregate Data

	1978	1990	2000	2012	2013
<i>Per Capita Annual Disposable Income of Urban Households (yuan)</i>	343	1510	6280	24565	26955
<i>Per Capita Net Income of Rural Residents (yuan)</i>	134	686	2253	7917	8896
<i>Outstanding Amount of Saving Deposits in Urban and Rural Areas (100 million yuan)</i>	211	7120	64332	399551	447602

Table 3.5 (a) *China Statistical Yearbook 2014, People's Living Condition, Aggregate data* <sup>51</sup>

<sup>49</sup> Matt Hartzell is a geographer and urbanist with specialties in urban planning, tourism, and transportation. After studying history at Harvard University, he spent six years in Yunnan, China. <https://www.linkedin.com/in/matthew-hartzell-7638a323>

<sup>50</sup> Stats.gov.cn. (2015). *China Statistical Yearbook 2014, Chp. 6.21 Per Capita Disposable Income of Urban Households by Region and 6.25 Per Capita Net Income of Rural Households by Region*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/indexeh.htm> [Accessed 16 May 2016].

The data in the table above shows the living conditions by rural and urban households. The table above (3.5 a) and below (table 3.5 b) are based on the result of national integrated household sample survey conducted by the Office of Household Survey by the NBS in 2013.<sup>51</sup>

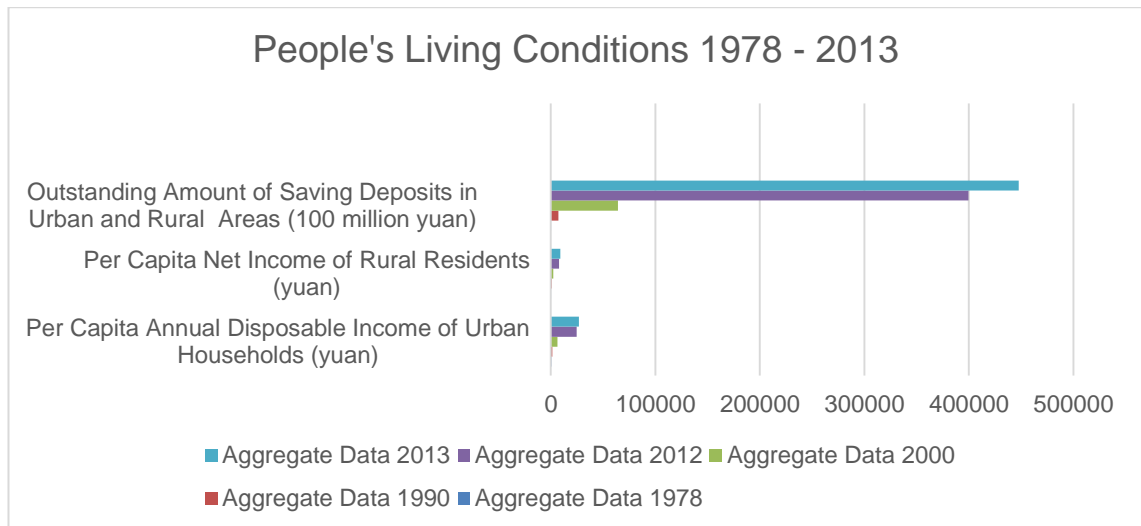


Table 3.5 (b) *China Statistical Yearbook 2014, People's Living Condition, Aggregate data*<sup>51</sup>

The NBS took the survey since the fourth quarter of 2012. The sample was selected randomly among 16,000 communities of counties, and included more than 2 million households surveyed. On this basis was selected a random sample of 160,000 households for keeping diaries. This kind of survey in China is taken with a regularity of every three years.

<sup>51</sup> Stats.gov.cn. (2015). *China Statistical Yearbook 2014, Chp 1.2 Principal Aggregate Indicators on National Economic and Social Development and Growth Rates*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/zk/html/Z0102E.htm> [Accessed 23 May 2016].

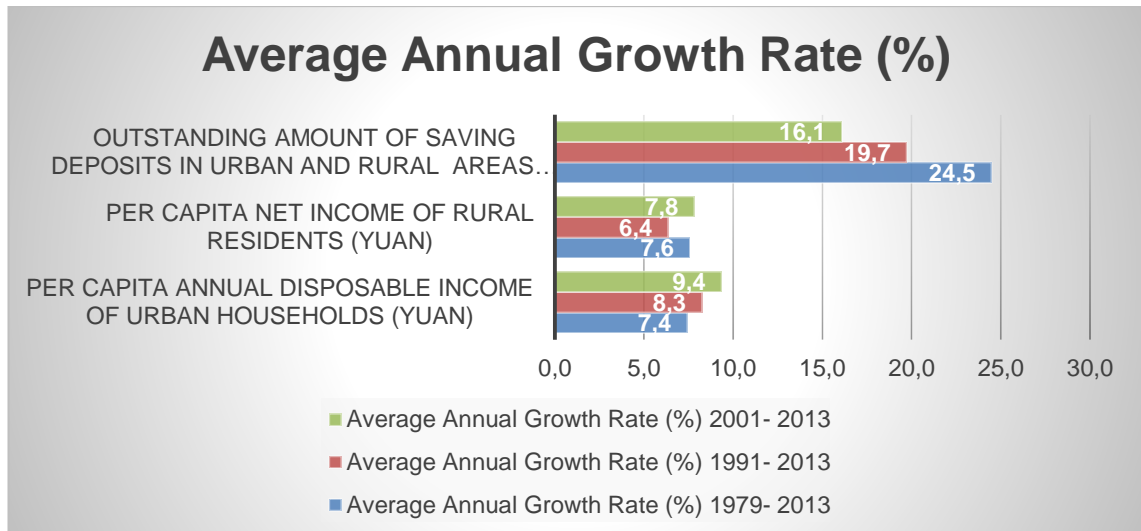


Table 3.5 (c) *China Statistical Yearbook 2014, People's Living Condition, Average Annual Growth Rate* <sup>51</sup>

It can be seen by the data on the table (c) that a gradual annual growth of people's living standards occurred in recent decades. A confirmation on this statement is the analysis of the data collected by the *China Statistical Yearbook 2014*, where it is shown an undeniable increase in income per capita.

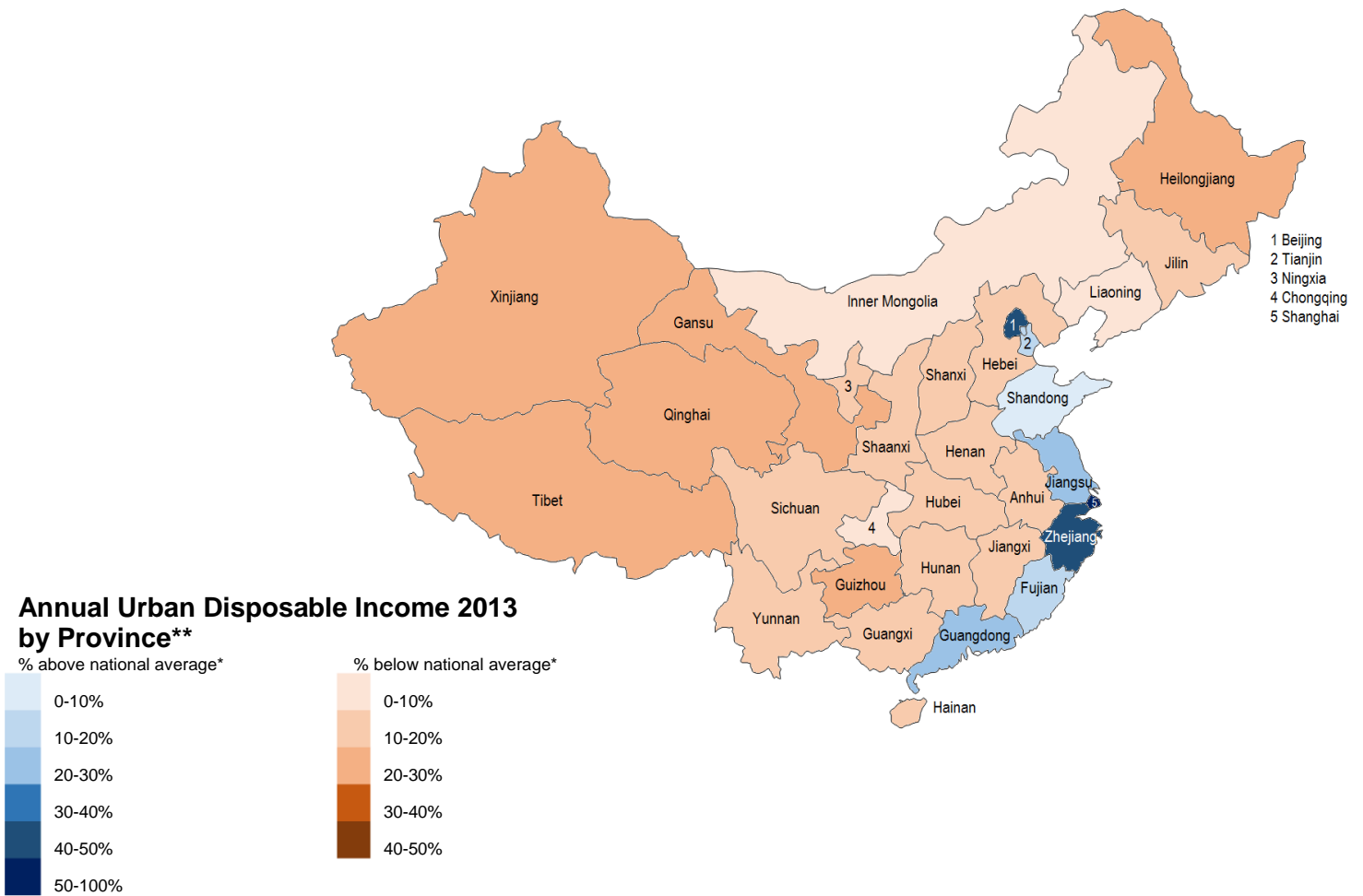


Figure 3.5 (b) Annual Urban Disposable Income by Province, adapted from Matt Hartzell, Simone Baldi 52

52

This map shows annual disposable income of the urban population in each province. The urban population of China accounts 53.73 per cent of the population, equal to 731,110,000 people in 2013. The uneven results remain almost invariable compared to the *Annual Income per Capita 2013* (Figure 3.5 a). The coastal provinces' income is still above the national mean of 25,955.10 yuan. Also in the figure above it can be seen that the country seems divided into three-four parts. The healthy coastal area, and the rest. The fourteen inland provinces, in pink, share the same percentage below the mean, counting a percentage between the minus 19 per cent of Ningxia and the minus 13.1 per

52 Baldi, S. (2016). Figure 3.5 (b), this map is an update of the work by Matt Hartzell but based on China Statistical Yearbook 2014. Hartzell, M. (2013). *China's Uneven Economic Development* [online] Matthartzell.blogspot.it. Available at: <http://matthartzell.blogspot.it/2013/09/chinas-economic-disparityin-maps.html> [Accessed 14 May 2016].

cent of Hunan. Of the western provinces Gansu maintains the lowest result with minus 29.6 per cent, followed by the north eastern province of Heilongjiang. This data alone does not capture the true reality, but anyway what is clear are the overwhelming differences between people living in the inland and western region with the wealthier coastal regions.

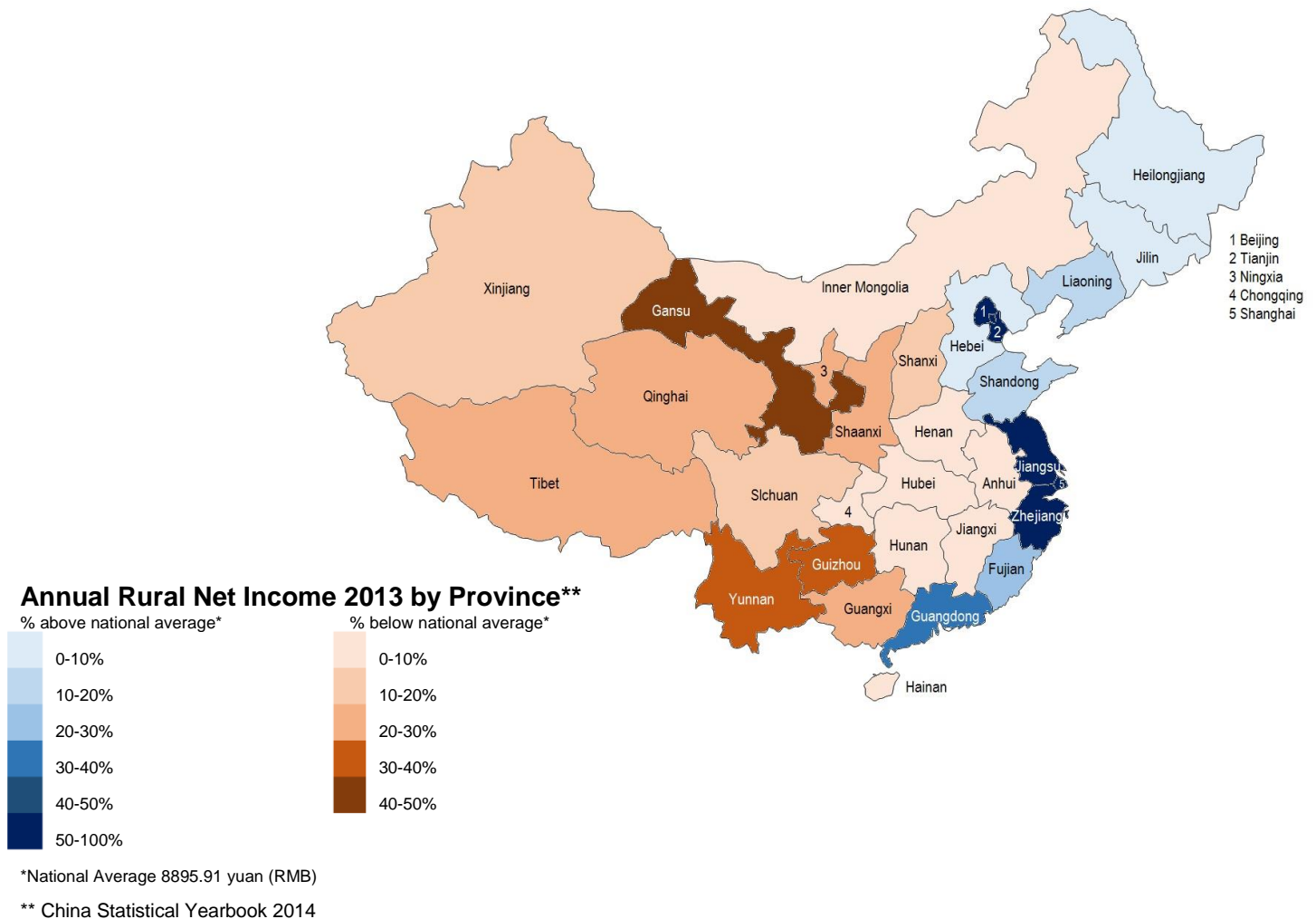


Figure 3.5 (c) Annual Rural Income by Province, adapted from Matt Hartzell, Simone Baldi<sup>53</sup>

53

The rural population of China represents 46.27 per cent of the country counting 629,610,000 people classified as rural households in 2013. The map shows their net income per capita per year per percentage above or below the national average of

<sup>53</sup> Baldi, S. (2016). Figure 3.5 (c), this map is an update of the work by Matt Hartzell but based on China Statistical Yearbook 2014. Hartzell, M. (2013). *China's Uneven Economic Development* [online] Matthartzell.blogspot.it. Available at: <http://matthartzell.blogspot.it/2013/09/chinas-economic-disparityin-maps.html> [Accessed 14 May 2016].

8,895.91 yuan. This time all the coastal provinces have above average incomes while the rest of inland and western provinces are below average. The lowest is once again Gansu province with 42.6 per cent below average followed by Yunnan and Guizhou, with 31 and 38.9 per cent below the average. In dark blue the provinces with above 50 per cent. The highest is Shanghai with 120.3 per cent above average, followed by Beijing 106.1 per cent, Zhejiang 81 per cent, Tianjin 78.1 per cent and Jiangsu 52.9 per cent. North-eastern provinces Heilongjiang and Jilin, with 8.3 and 8.2 per cent, are considered although a rigid winter climate, to have high agricultural production, and their rural incomes reflect that. There can be seen a great variety in the income levels of the rest of the inland provinces. This time, far western Tibet and Xinjiang are not the lowest. One possible explanation for the relatively high income levels of rural populations in cities in dark blue like Shanghai, Beijing and Tianjin could be probably related to the lump sum that developers pay farmers in compensation for developing their land.

### 3.6 China, GDP and GNI

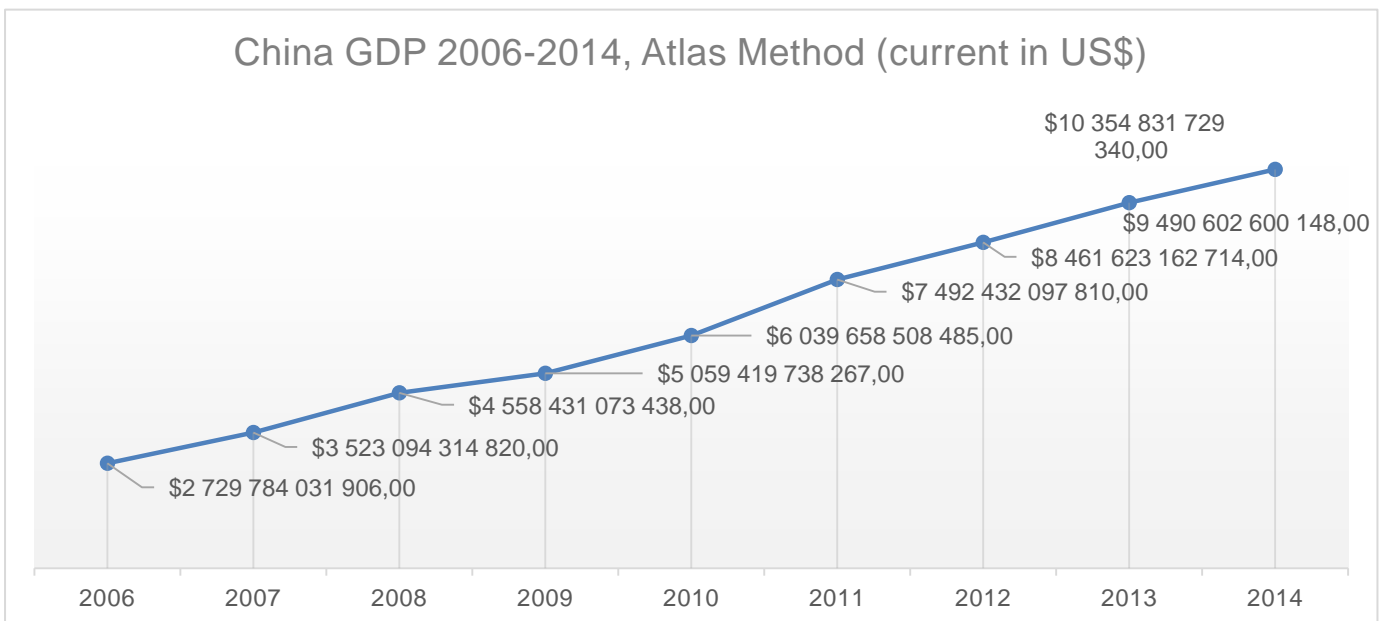


Table 3.6 (a) China GDP 2006-2014 in US\$, World Bank <sup>54</sup>

In 2013 the GDP per capita, reported on *China Statistical Yearbook 2014*, was of 41,908 yuan, but this data measures just the trend of living standards of people over time. The *World Bank* estimated China's GDP at 9.49 trillion dollars, while in 2014 it increased by

<sup>54</sup> World Bank, (2016). *GDP at market prices (current US\$) | Data | Graph*. [online] Data.worldbank.org. Available at: <http://data.worldbank.org/indicator/NY.GDP.MKTP.CD/countries/CN?display=graph> [Accessed 15 May 2016].



approximately 9.1 per cent, reaching 10.35 trillion dollars. The GDP data reported attempts just to pinpoint the country's economic health.

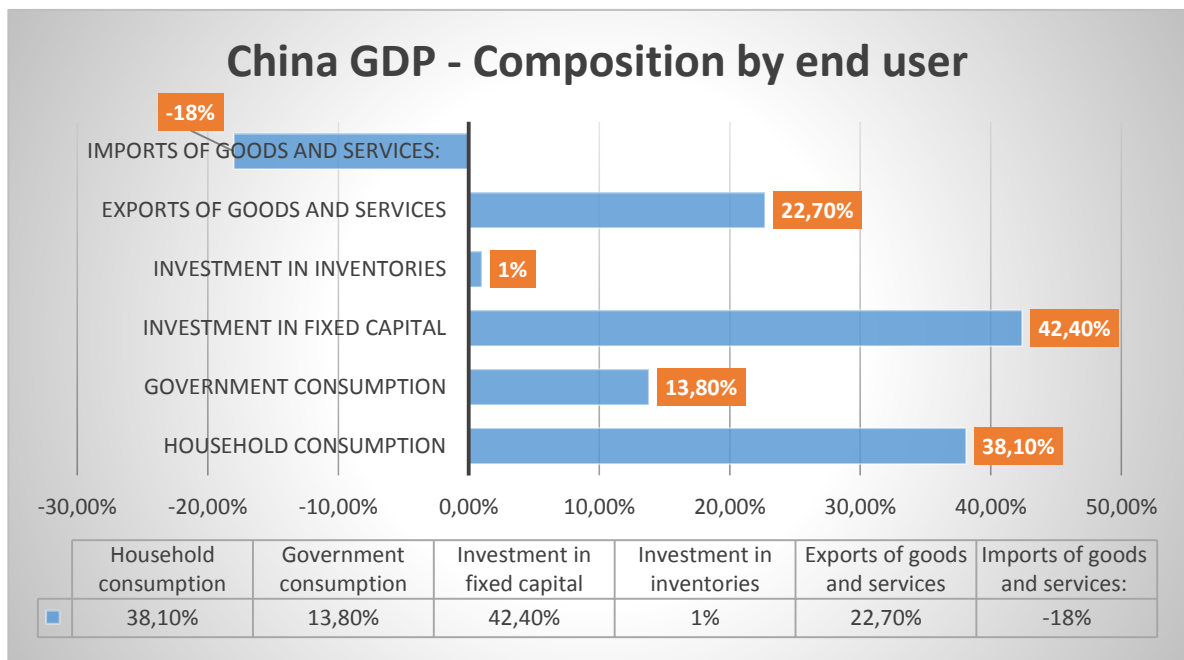


Table 3.6 (b) China GDP - Composition by end user, *The World Factbook 2015*<sup>55</sup>

Table 3.6 (b) illustrates the GDP, calculated with expenditure approach. This refers to total expenditure in the final consumption based on data of the *CIA* published in 2015.

<sup>55</sup> Cia.gov. (2016). *The World Factbook*. China Facts and Figures [online] Available at: <https://www.cia.gov/library/publications/the-world-factbook/geos/ch.html> [Accessed 7 May 2016].

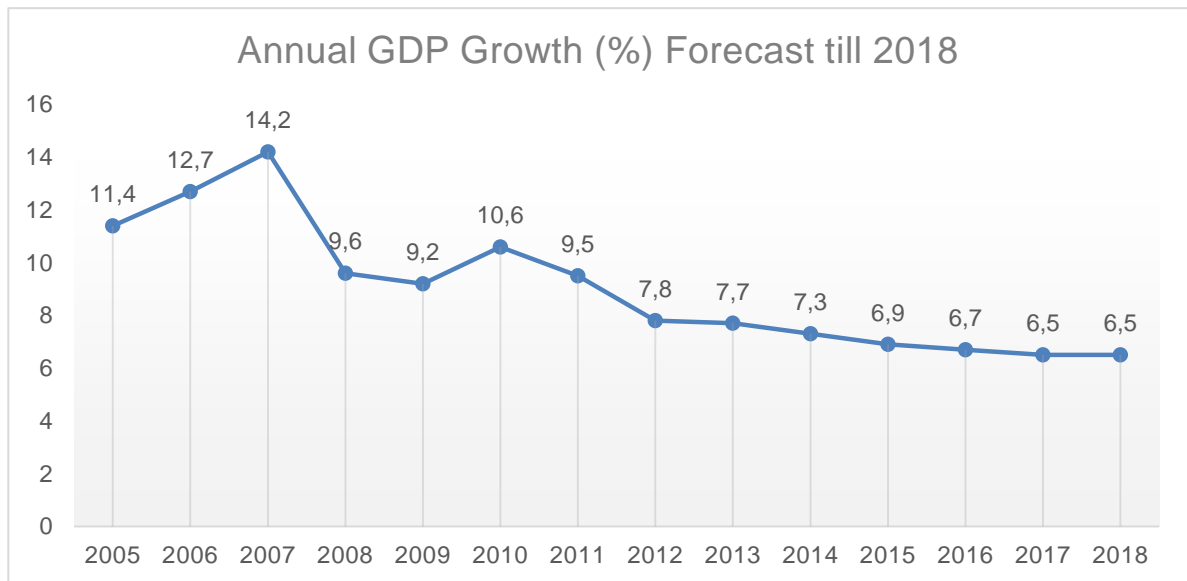


Table 3.6 (c) Annual GDP Growth (%) Forecast till 2018, World Bank 2016<sup>56</sup>

56

Although showing an increase in GDP (table 3.6 a), the *Annual GDP Growth forecast till 2018* sees a different and slightly negative trend. In the last *Five Year Plan*, China's leaders decided on policy, economic, market and domestic objectives, and the economic growth rate. Premier Li claimed that China will grow between 6.5 and 7 per cent, slightly lower than 2015.<sup>57</sup> One of the reasons for this slowdown of China's economy could be Chinese exports and trade, dragged down by slow growth in Europe and elsewhere that eventually reduces the demand for Chinese goods. To respond to this challenge the Chinese government has at least two choices, such as weakening the yuan in order to stimulate foreign demand, or to invest to increase the internal consumption. But let's forget for a moment how government will plan to respond to the challenges to keep economic growth, and focus more on getting an accurate description of China's economic worth.

GDP and GNI (formerly GNP) both attempt to measure the market value of all goods and services that an economy produces. The basic difference between the two terms is the definition of the economy. While GDP refers to the domestic level of production, GNI measures the production of any person or firm of the country regardless where the

<sup>56</sup> World Bank (2016). *China | Data*. [online] Available at: <http://data.worldbank.org/country/china> [Accessed 9 May 2016].

<sup>57</sup> Zervos, S. (2016). *China's Growth Is Slowing Further, Should Markets Be Scared?* [online] Forbes.com. Available at: <http://www.forbes.com/sites/sarazervos/2016/03/17/chinas-growth-is-slowing-further-should-markets-be-scared/#3a634b633953> [Accessed 15 May 2016].

production takes place, including overseas. In other words, GNI measures income received by a country both domestically and from overseas.

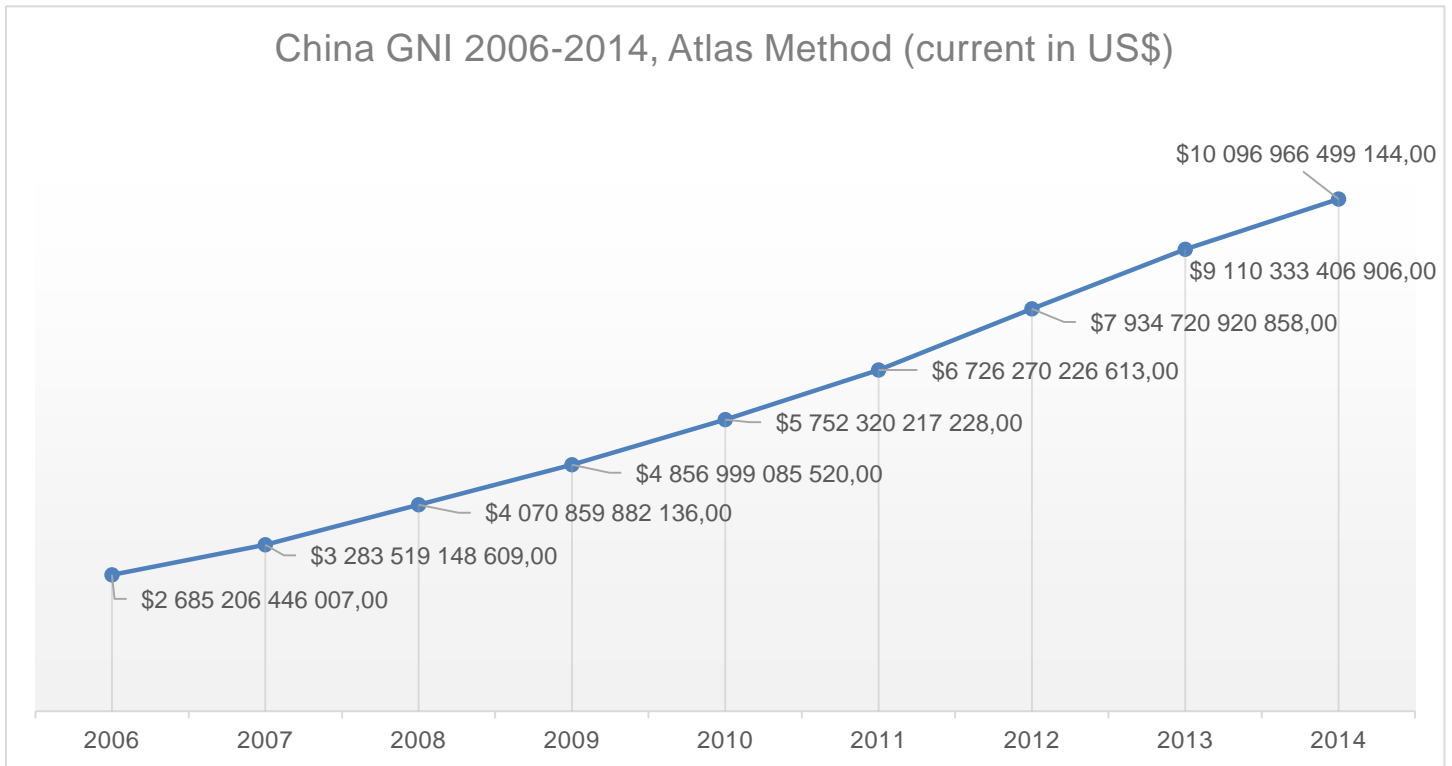


Table 3.6 (d) China GNI, Atlas Method (current in US\$), World Bank 2016 <sup>58</sup>

58

In 2014, China's GNI counted 10 trillion dollars, approximately 300 billion dollars lower than its GDP. This difference is due to foreign companies operating in the manufacturing sector and exporting overseas. GNI is therefore useful to pinpoint the national output.

<sup>58</sup> World Bank, (2016) a. *GNI, Atlas method (current US\$) | Data | Table*. [online] Data.worldbank.org. Available at: <http://data.worldbank.org/indicator/NY.GNP.ATLS.CD> [Accessed 15 May 2016].

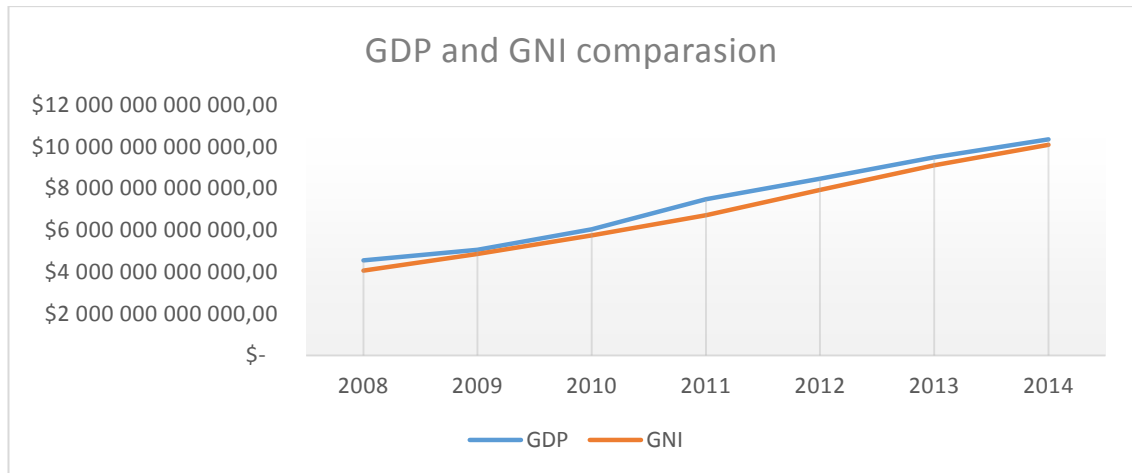


Table 3.5 (e) GDP and GNI Comparison

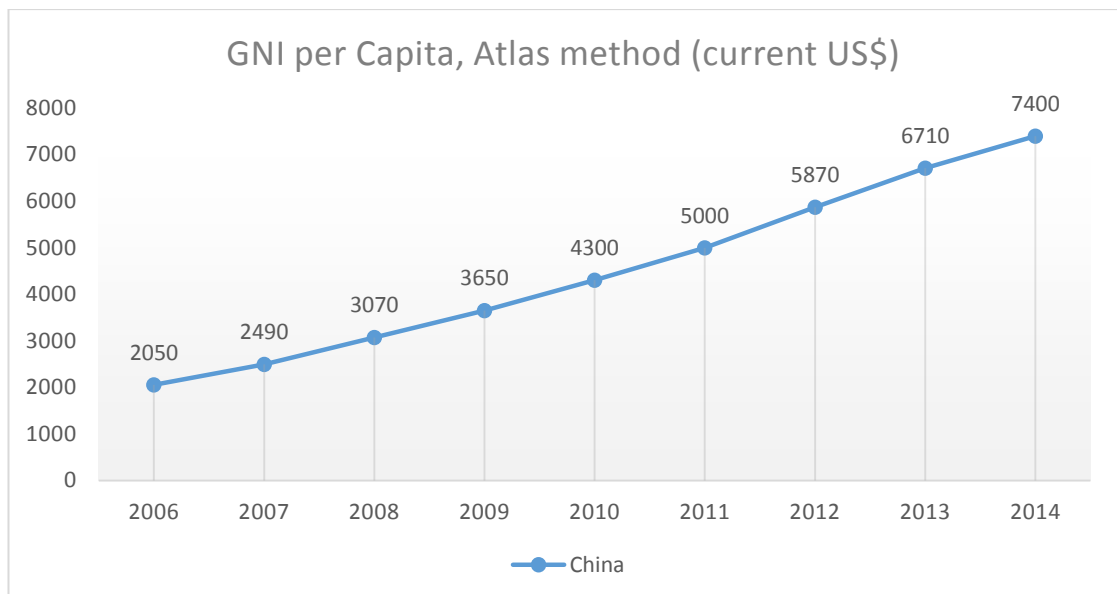


Table 3.6 (f) GNI per Capita, Atlas Method (current US\$), World Bank <sup>59</sup>

China's GNI per capita reached 7,400 dollars in 2014. This result classifies China as an *upper middle income country* by using the World Bank's Atlas method. As on 1st July 2014, the World Bank reclassified world's economies by their different GNI per capita as: low-income of \$1,045 or less in 2013; middle-income than \$1,045 but less than \$12,746; high-income \$12,746 or more. Lower-middle-income and upper-middle-income economies are separated at a GNI per capita of \$4,125.<sup>60</sup>

<sup>59</sup> World Bank (2016) b. *GNI per capita, Atlas method (current US\$) | Data | Graph*. [online] Available at: <http://data.worldbank.org/indicator/NY.GNP.PCAP.CD/countries/CN-4E-XT?display=graph> [Accessed 9 May 2016].

<sup>60</sup> World Bank, (2014). *Updated Income Classifications | Data*. [online] Data.worldbank.org. Available at: <http://data.worldbank.org/news/2015-country-classifications> [Accessed 16 May 2016].

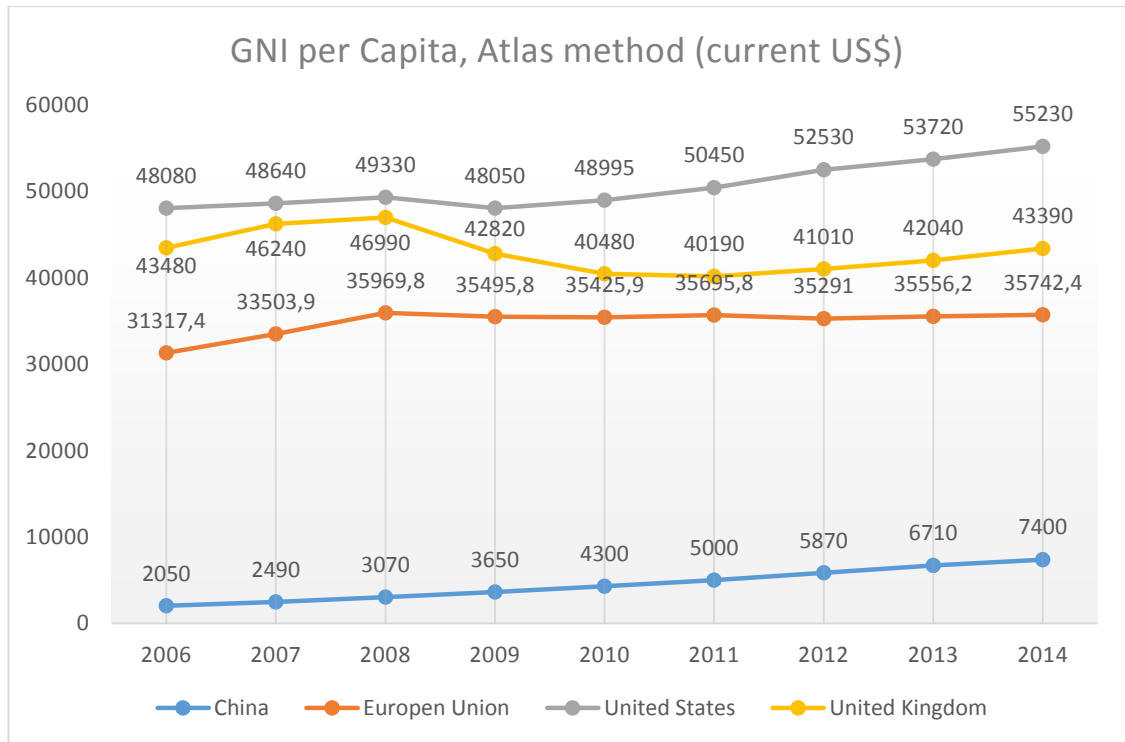


Table 3.6 (g) GNI per Capita, China, US, Europe Union, UK, World Bank <sup>61</sup>

The table above aims to compare China's GNI per Capita with some of the largest world economies, although it reflects comparative information solely.

### 3.7 China's income inequality

Over recent decades China's economic growth has indeed been remarkable, but analysing its population in terms of GDP per capita, it still ranks only 121st in the world economy.<sup>62</sup> In addition, despite it is healthy coastal area, China suffers from alarming national income inequality. This can be seen in the paragraph 3.5 *Income by Province* and especially analysing the Gini index, a statistical measure that is used to represent unequal distributions, both making clear how uneven is the level of national income.

<sup>61</sup> World Bank (2016) c. *GNI per capita, Atlas method (current US\$) | Data | Graph*. [online] Available at: <http://data.worldbank.org/indicator/NY.GNP.PCAP.CD/countries/CN-EU-US-GB?display=graph> [Accessed 9 May 2016].

<sup>62</sup> Indexmundi, (2016). *GDP - per capita (PPP) - Country Comparison*. [online] Indexmundi.com. Available at: <http://www.indexmundi.com/gr.aspx?v=67> [Accessed 16 May 2016].

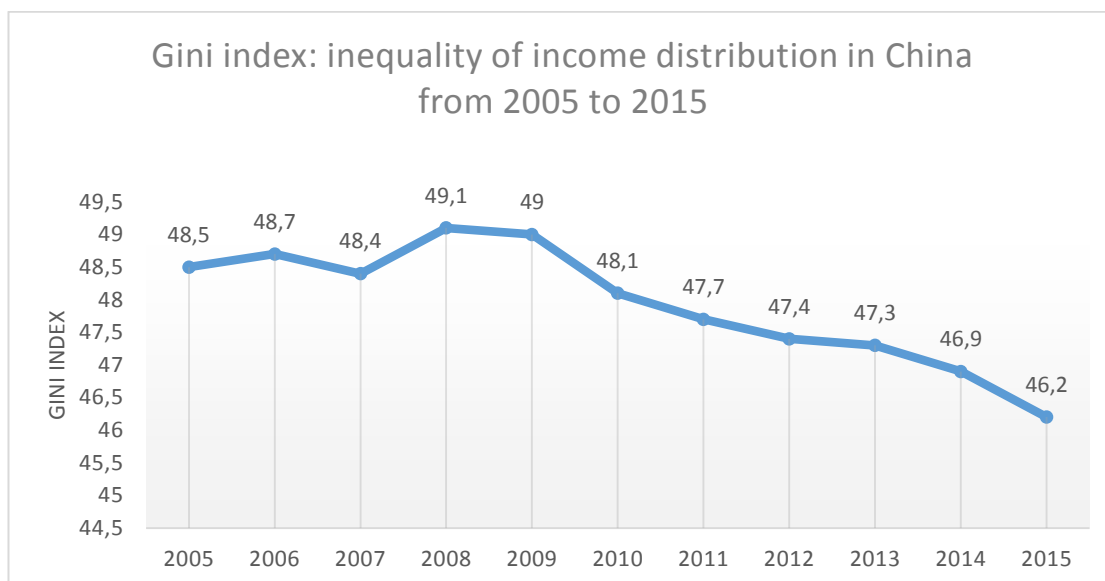


Table 3.7 (a) *Gini Index: Inequality of Income Distribution in China*<sup>63</sup>

On the table above is shown the inequality of income distribution in China from 2005 to 2015. In the year 2008, China reached the higher score of 49.1 per cent. The Gini coefficient works in this way: there are values from 0 to 100, the higher the value the higher is the more unequal distribution, and in this case the higher is the percentage the higher is the income inequality. It is known that the value of Gini coefficient set by the United States is 0.40 points, or 40 per cent; above that is a warning level.

It was argued that China's *National Bureau of Statistics (NBS)*, the organization that collects and releases the government data of China, stopped divulging data about the Gini coefficient after it reached 41 per cent in the year 2000. In 2013 an economist claimed that the Gini coefficient reached in China a very dangerous high level of 61 per cent, after that the *NBS* started to release data again. But despite the claims and debates of scholars and economists against the true identity of Chinese statistical data, the *NBS* released data of Gini coefficient that was slightly below 0.50 points<sup>64</sup>. The aim of this section is to pinpoint the level of inequality occurring in the country. However, in contradiction with these data, it must be acknowledged that China is undoubtedly a world-leader in poverty reduction and improving health outcomes. According to the *United Nations Development Plan (UNDP)* China succeeded, from 1990 and 2011, to lift

<sup>63</sup> Statista (2016). *China: income distribution Gini index 2015* | Statistic. [online] Available at: <http://www.statista.com/statistics/250400/inequality-of-income-distribution-in-china-based-on-the-gini-index/> [Accessed 9 May 2016].

<sup>64</sup> Xie, Y. and Zhou, X. (2014). *Income inequality in today's China*. [online] PNAS. Available at: <http://www.pnas.org/content/111/19/6928.full.pdf> [Accessed 10 May 2016].

out of extreme poverty approximately 439 million people and that it had contributed to 76 per cent of all global poverty reduction. Nevertheless on the data analysed by the Gini coefficient above poverty still remains an issue in China, and as was cited at the last 2015 *Global Poverty Reduction and Development Forum*, 70 million people remain below the national poverty line.<sup>65</sup>

What has been seen so far on the analysis of the preceding sections (3.5 and 3.6) is that most of Chinese wealth is concentrated along the coast, while miles away from that, inside, northern and in the western lands there are many Han Chinese still living in Third World poverty. The China that most foreigners think about, the wealthy one, is the thin strip along the coast. The stark reality is that China is an overwhelmingly poor country with a thin veneer of prosperity.

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<sup>65</sup> Veres, A. (2015). *China's Poverty Reduction – A Job Done?* [online] UNDP in China. Available at: <http://www.cn.undp.org/content/china/en/home/presscenter/op-eds/2015/10/chinas-poverty-reduction--a-job-done.html> [Accessed 16 May 2016].

## 4 English Language is still living an exponential growth market

### 4.1 ELT Market in China

As result of decades of developing growth and aspiration to gain an international stature, today China has the biggest education market per number of students, and in this context English language education training can take fully advantage of this growth market. The English language training (*ELT*) market in China is mainly represented by private institutes and training centers nationwide. Considering the fact that English language is mandatory in the Chinese education system, and that today even in pre-school English is taught, it seems plausible to count more than 255 million as English learners - based on the enrolment numbers of 2013 - and as assuming this number as target it is reasonable to assume that the market has tremendous opportunities for local and international vendors.<sup>66</sup> The *ELT* market in China has flourished due to many factors over time, such as the admission to the *World Trade Organization (WTO)* in 2001 that encouraged foreign investment, and the entrance of global firms into the country. There was also the hosting of the *Olympic Games* in 2008 and the *World Expo* in Shanghai in 2010. Over the years, China has also earned the reputation of being a popular destination for international fairs, particularly in cities such as Guangzhou, Beijing, Shanghai, Shenzhen and Tianjin, which further emphasizes the growth of English language requirements in China. As a result, the *ELT* service experienced an exponential acceleration covering different segments. As stated above, since 2001 English language is compulsory from elementary school,<sup>67</sup> and part of the *gaokao*, the Chinese national higher education entrance examination, which was recently reformed. In this context it is not difficult to picture how widely the demand for *ELT* is growing. In 2010, *China Daily* published that China became the biggest *ELT* market and that its value was reaching 30 billion yuan.<sup>68</sup> In 2015, a report by *TechNavio*, a market research Company, forecasted that the *ELT* market is expected to reach a *Compound Annual Growth Rate* of approximately 19 per cent to 2019. Moreover the research identifies that because of an

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<sup>66</sup> Stats.gov.cn. (2015). *China Yearbook 2014, Chp. 21.2 Number of Students of Formal Education by Type and Level (2013)*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/zk/html/Z2102E.htm> [Accessed 19 May 2016].

<sup>67</sup> MOE, (2001). *教育部关于积极推进小学开设英语课程的指导意见, The Ministry of Education actively promoting guidance on primary school English classes - 中华人民共和国教育部政府门户网站*. Moe.gov.cn. Available at: [http://www.moe.gov.cn/srcsite/A26/s7054/200101/t20010120\\_166075.html](http://www.moe.gov.cn/srcsite/A26/s7054/200101/t20010120_166075.html)

<sup>68</sup> He, N. (2010). *China Daily, 2010, Rush to learn English fuels quality issues*. [online] Chinadaily.com.cn. Available at: [http://www.chinadaily.com.cn/china/2010-08/05/content\\_11098499\\_3.htm](http://www.chinadaily.com.cn/china/2010-08/05/content_11098499_3.htm) [Accessed 18 May 2016].



increase in student mobility to countries such as United Kingdom and USA, Chinese are seeking English language courses that include test preparation, personal development and business related content.<sup>69</sup>

#### 4.2 Factors impacting growth

According to various studies that forecasted the *ELT* market's positive growth for at least next four years, there are other factors driving growth. Firstly, the significant investment in human capital that the Chinese government is making. Secondly, there is a shortage of native English-speaking teachers as compared to the constantly increasing demand by English learners. Local social networks, national and international English training companies, are advertising job vacancies for English teachers. In this context, recently the government took measures to make clear the mandatory requirement that companies would check the background of tutors, and introduced stringent eligibility criteria for teachers, especially in the big cities of Beijing, Shanghai, and Guangzhou where checks are constantly implemented. English teachers are required to have a minimum qualification of bachelor's or a higher degree along with a minimum of related work experience to satisfy the criteria, despite the fact to be native speakers and preferable from a country such as United Kingdom or USA.

#### 4.3 ELT key customer segments

A report by the *21st Century Education Research Institute in Beijing* stated that 70 per cent of Chinese parents want their children to learn English. The report mentioned also the age children are introduced to English for the first time, with over 47 per cent of them

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<sup>69</sup> TechNavio, (2015). *English Language Training Market in China: Trends and Forecast 2015-2019 | TechNavio - Discover Market Opportunities*. [online] Technavio.com. Available at: <http://www.technavio.com/report/english-language-training-market-in-china-trends-and-forecast-2015-2019> [Accessed 18 May 2016].

between three and six years old.<sup>70</sup> TechNavio market research reports that there are two dominant segments: the Pre K-12 and the adult segment.<sup>71</sup>

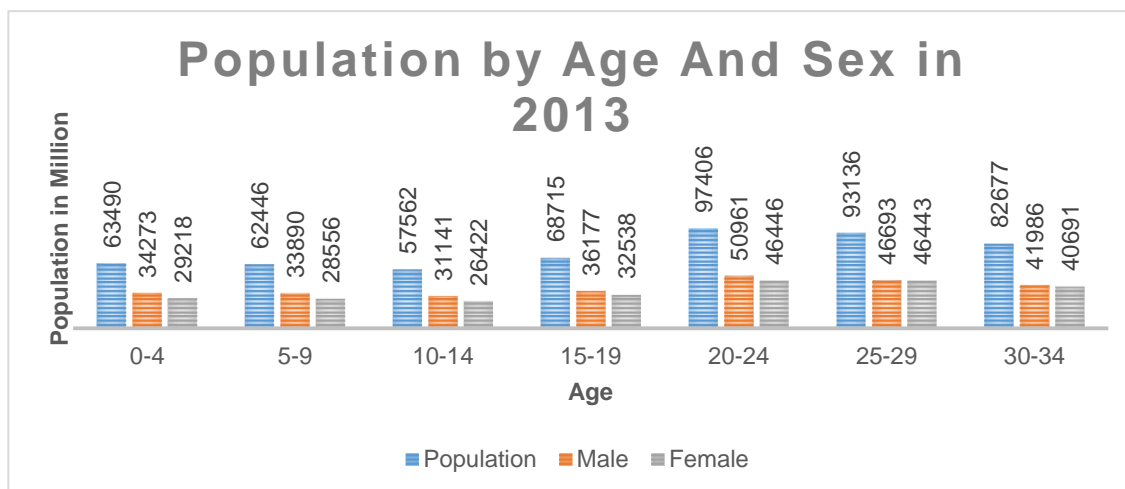


Table 4.3 (a) Population by Age and Sex in 2013<sup>72</sup>

In 2013 the total population was 1.11 billion, and the population of citizens aged between 0 and 34 amounted to 525 million, equal to 46.98 per cent of the national total. This number includes every target from pre-school to higher adult education segments.

<sup>70</sup> Adkins, S. (2015). *2015-2020 China Digital English Language Learning Market*. [online] Ambient Insight. Available at: [http://www.ambientinsight.com/Resources/Documents/AmbientInsight\\_2015-2020\\_China\\_Digital\\_English\\_Market\\_Abstract.pdf](http://www.ambientinsight.com/Resources/Documents/AmbientInsight_2015-2020_China_Digital_English_Market_Abstract.pdf) [Accessed 18 May 2016].

<sup>71</sup> TechNavio, (2015). *English Language Training Market in China: Trends and Forecast 2015-2019 | TechNavio - Discover Market Opportunities*. [online] Technavio.com. Available at: <http://www.technavio.com/report/english-language-training-market-in-china-trends-and-forecast-2015-2019> [Accessed 18 May 2016].

<sup>72</sup> Stats.gov.cn. (2015). *China Statistical 2014, Chp. 2.8 Population by Age and Sex (2013)*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/zk/html/Z0208E.htm> [Accessed 19 May 2016].

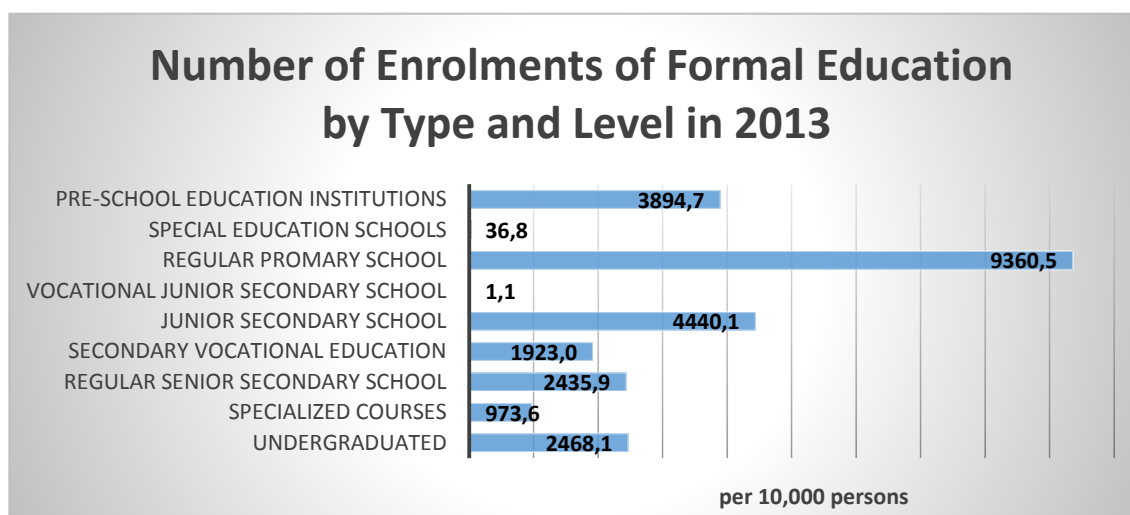


Table 4.3 (b), Number of Enrolments of Formal Education by Type and Level in 2013 <sup>73</sup>

Based on data of *China Statistical Yearbook 2014*, on the above table are reported the *Number of Enrolments of Formal Education by Type and Level in 2013*. In China, the 幼儿园 (read yòu'éryuán), Chinese kindergartens, accept students between of 2 and 5 years old. Most of them offer English programs, supporting the learning using updated technological material, and English lessons with foreigner or native speaker teachers. In 2013 there were 198,533 pre-school education institutions with 38,946,903 enrolments accounted.<sup>74</sup> With these numbers and given Chinese parents' behaviour in seeking English language learning for their children, it is worth analysing how this segment is extremely commercialized in the country where many different players are competing each other mostly in price. Studies have predicted that the pre-school market will continue growing, and when it will reach a mature stage the quality will be next driving force, in which outstanding educational institutions may be expected to win more market share.<sup>75</sup>

<sup>73</sup> Stats.gov.cn. (2015). *China Statistical Yearbook 2014, Chp. 21.8 Number of Enrolments of Formal Education by Type and Level*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/zk/html/Z2108E.htm> [Accessed 19 May 2016].

<sup>74</sup> Stats.gov.cn. (2015). *China Yearbook 2014, Chp. 21.2 Number of Students of Formal Education by Type and Level (2013)*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/zk/html/Z2102E.htm> [Accessed 19 May 2016].

<sup>75</sup> Deloitte, (2013). *Reflections on education and technological development in China 2013 | Deloitte China | Technology, Media & Telecommunications | Education, Technology*. [online] Deloitte China. Available at: <http://www2.deloitte.com/cn/en/pages/technology-media-and-telecommunications/articles/reflections-education-technological-development-china2013.html> [Accessed 20 May 2016].

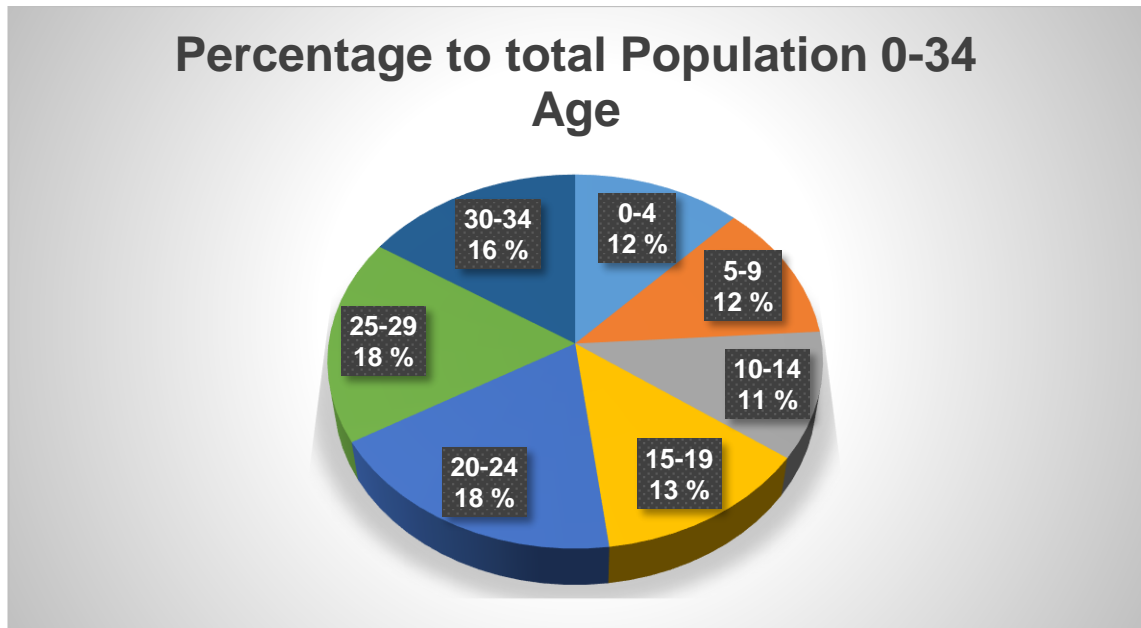


Table 4.3 (c) Percentage of total Population 0-34 Age in 2013, created based on data by Stats.gov.cn <sup>76</sup>

Children under 14 years of age accounted for 16.4 per cent of the 1.1 billion population of 2013, whereas the population between 0 and 34 years old accounted for 35 per cent. Considering these data it is potentially true to estimate the Pre K-12 segment to a percentage close or higher than 20 per cent of the 0-34 aged population. Instead for the adult segment, in view of people the number of age between 25 and 34 years old, is accounted to 34 per cent. Both together represent a significantly large portion of users of English language products and services offered by the players catering to these age groups. The last decade's development of the Chinese economy stimulated the industry, and in response the demand for highly skilled professionals increased, supporting the growth in demand for English language learning. There has also been an increase in the number of Chinese students that decide to have higher education abroad. In this context private English learning institutions operate and compete with each other, not only in price, but mostly quality and value-added services.

<sup>76</sup> Stats.gov.cn. (2015). Created based on data from Stats.gov.cn. (2014). *China Statistical 2014, Chp. 2.8 Population by Age and Sex (2013)*. [online] Available at: <http://www.stats.gov.cn/tjsj/ndsj/2014/zk/html/Z0208E.htm> [Accessed 19 May 2016].

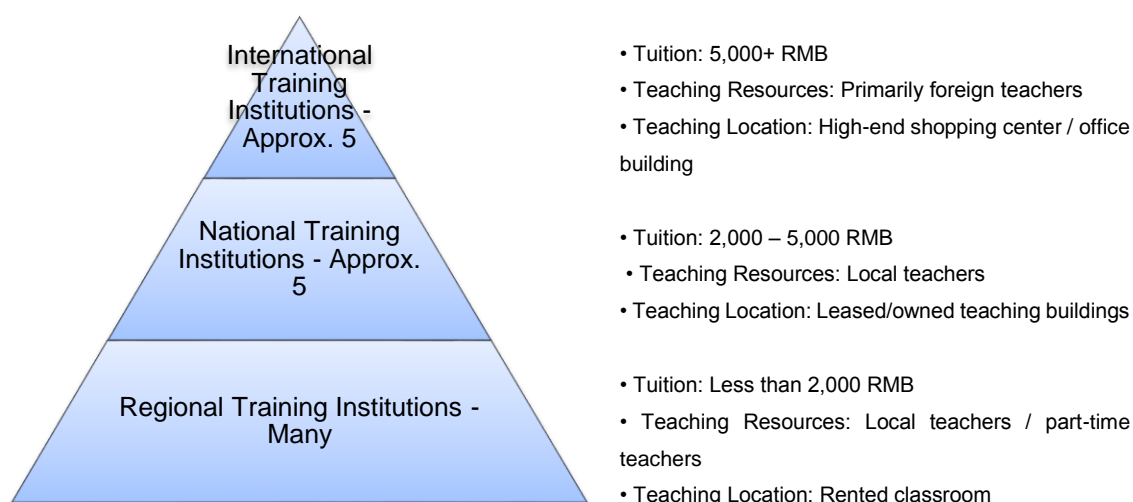


Figure 4.3 (a) Business English Training Course example, Summarized Pricing from Internet Homepages, Deloitte 2012<sup>77</sup>

On the above figure are summarized price differentiation of English institution offering business English courses reported on a research by the consulting service firm *Deloitte*.<sup>77</sup>

Also because of brand positioning, most of those training providers tend to select a location in a high-end shopping mall or office building in a central area. Moreover by leveraging the international influence of their brands, like *Pearson Wall Street English* and *English First* (paragraph 4.5.1 and 4.5.2), English language firms often maintain relationships with leading national businesses providing them with services like English training for employees. In addition, most of the education companies offer overseas experiences, exchange programs, and also service as English courses abroad for students that aim to enter in university in countries such as UK, USA, Canada and Australia. This generates considerable appeal to adult target customers that, as seen in the previous table *Percentage of Population of 0-34 Age*, citizens between 20 and 34 years old accounted for a significant 52 per cent.

#### 4.4 Digital English Language Learning

The largest amount of revenue of English Education in China comes from the offline *English Language Learning*. This includes classroom and printing material. However, beside the offline market there is a percentage that involves digital learning. According

<sup>77</sup> Deloitte, (2013). *Reflections on education and technological development in China 2013 | Deloitte China | Technology, Media & Telecommunications | Education, Technology*. [online] Deloitte China. Available at: <http://www2.deloitte.com/cn/en/pages/technology-media-and-telecommunications/articles/reflections-education-technological-development-china2013.html> [Accessed 20 May 2016].

to *2015-2020 China Digital English Language Learning Market*, market research conducted by *Ambient Insight*, in 2015 the digital market reached a lucrative revenue of \$938.6 million and will climb to \$1.0 billion by 2020.<sup>78</sup>

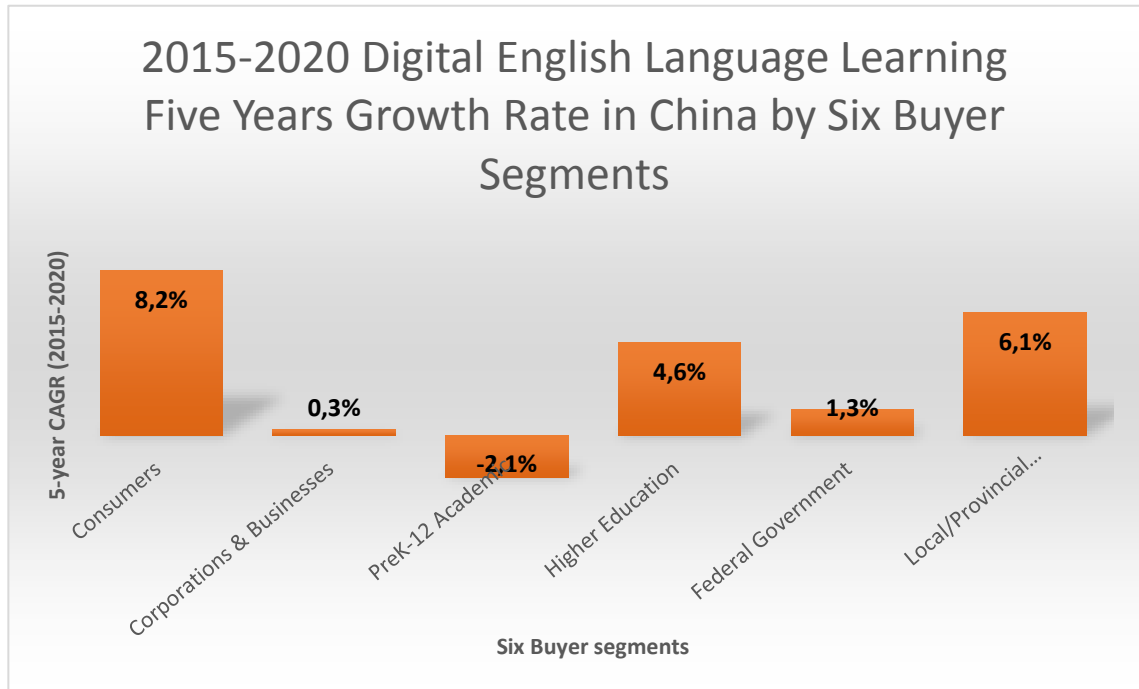


Table 4.4 2015-2020 Digital English Language Learning Five Years Growth Rate in China by Six Buyer Segments <sup>79</sup>

Moreover the research provides revenue forecasts for six buying segments: consumers, corporations and businesses, PreK-12 school systems, higher education institutions, federal government agencies, and local-provincial government agencies. As shown on the above chart, the Pre K-12 segment is the only with a negative growth.

#### 4.5 Various Global Language Company in China

Various companies both national and foreign operate within the English language training segments of the private sector. Some of the most prominent vendors of English courses in China are *Pearson* (through the brand *Wall Street English*), *English First*, *New Oriental Technology*, and *Disney English*. Those companies have several training

<sup>78</sup> Adkins, S. (2015) a. *2015-2020 China Digital English Language Learning Market*. [online] Ambient Insight. Available at: [http://www.ambientinsight.com/Resources/Documents/AmbientInsight\\_2015-2020\\_China\\_Digital\\_English\\_Market\\_Abstract.pdf](http://www.ambientinsight.com/Resources/Documents/AmbientInsight_2015-2020_China_Digital_English_Market_Abstract.pdf) [Accessed 18 May 2016].

<sup>79</sup> Adkins, S. (2015) b. Ambient Insight's *The 2015-2020 Worldwide Digital English Language Learning Market: Premium Edition* p.14 [http://www.ambientinsight.com/Resources/Documents/AmbientInsight\\_2015-2020\\_Worldwide\\_Digital\\_English\\_Market\\_Sample.pdf](http://www.ambientinsight.com/Resources/Documents/AmbientInsight_2015-2020_Worldwide_Digital_English_Market_Sample.pdf)

centers around China, covering cities of the first tier such as Beijing and Shanghai, and second tier cities like Tianjin, Chongqing, and Shenzhen. Some of them, apart from offering language training through classroom with the support of print material, have also invested in providing online training.

Company	2013 Fiscal Year Revenue	2012 Fiscal Year Revenue	Revenue Growth over prior FY	2013 Net Income (millions)	Company's Year-end date
<b>New Oriental</b>	1,055	861	23%	187	30/11/2013
<b>Xueda Education</b>	347	293	18%	16	31/12/2013
<b>TAL Education</b>	287	218	31%	51	30/11/2013
<b>ATA</b>	62	60	4%	6	31/12/2013
<b>China Distance Education</b>	77	55	40%	16	31/12/2013
<b>Hongcheng Education</b>	87	78	11%	8	31/12/2013
<b>Ned Noah</b>	38	30	27%	4	31/12/2013
<b>Qtone Education</b>	28	26	8%	8	31/12/2013
<b>Total</b>	1,980	1,621	22%	294	

Table 4.5 Revenues of Publicly-Listed Chinese Education Companies in \$US million <sup>80</sup>

The above table shows publicly-listed Chinese educational companies operating in English language learning. The table appears on the *Report on the Diversification of China's Education Industry 2014* by Deloitte.

#### 4.5.1 Pearson, Wall Street English and Longman Schools



*Pearson PLC*, a British multinational with headquarter in London, it is the largest education company and the largest book publisher in the world reaching a revenue of

<sup>80</sup> Deloitte, (2014). *Report on the Diversification of China's Education Industry 2014*. [online] Deloitte. Available at: <http://www2.deloitte.com/content/dam/Deloitte/cn/Documents/technology-media-telecommunications/deloitte-cn-tmt-deloitte2014educationindustryreport-en-220514.pdf> [Accessed 20 May 2016].

\$7,072 million in 2014. *Pearson* is listed on the *London Stock Exchange* and *FTSE 100* in UK, and in the *New York Stock Exchange* in USA. In the end last 2015 *Pearson* announced a rebranding, a new logo and a *100% focus* on education. It began its commitment to China with partnership since 1960s<sup>81</sup>. Driven by acquisition strategy, *Pearson* acquired other education companies and through them today operates in China national wide. In 2008 it acquired *Longman Schools*, a year later *Wall Street English* for \$145 million in cash, and in 2011, for \$155 million, *Global Education and Technology Group*, a leading Chinese provider of test preparation services for students who are learning English.<sup>82</sup>

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<sup>81</sup> Pearson APAC, (2016) a. *Pearson APAC*. [online] Pearsonapac.com. Available at: <http://pearsonapac.com/index.php?section=75> [Accessed 22 May 2016].

<sup>82</sup> Pearson, (2011). *Pearson to acquire Global Education in China for \$155m*. [online] Pearson.com. Available at: <https://www.pearson.com/news/announcements/2011/november/pearson-to-acquire-global-education-in-china-for-155m.html> [Accessed 22 May 2016].





### Longman Schools

<b>Website</b>	<a href="http://www.longmanschools.com.cn/">http://www.longmanschools.com.cn/</a>
<b>Number of centers</b>	19
<b>English Programmes</b>	<p>Helping children to improve the quality of their English skills.</p> <ul style="list-style-type: none"> <li>- 3 to 6 years old, English course</li> <li>- 7 to 12 years old, English course</li> <li>- 13 to 16 years old, English course</li> <li>- 5 to 10 years old Phonics Spelling course</li> <li>- Summer camp</li> </ul>
<b>Target</b>	Kids from 3 to 16 years old
<b>Cities</b>	Shanghai

Table 4.5.1 (a) Longman Schools



### Wall Street English

<b>Website</b>	<a href="http://www.wsi.com.cn/">http://www.wsi.com.cn/</a>
<b>Number of centers</b>	70
<b>English Programmes</b>	<p>Provides English language instruction to adults and corporate clients.</p> <ul style="list-style-type: none"> <li>- Introduction to English (ITE)</li> <li>- English Flex</li> <li>- Premier English</li> <li>- Pro Courses</li> </ul>
<b>Target</b>	Adults and corporate clients
<b>Cities</b>	Beijing, Tianjin, Qingdao, Shanghai, Nanjing, Suzhou, Guangzhou, Foshan, Shenzhen, Wuxi

Table 4.5.1 (b) Wall Street English



## Global Education and Technology Group Limited

<b>Website</b>	<a href="http://www.gedu.org/">http://www.gedu.org/</a>
<b>Number of centers</b>	121
<b>English Programmes</b>	<p>Provides English language training and test preparation for students who are working towards internationally-recognised English language assessments.<sup>83</sup></p> <ul style="list-style-type: none"> <li>- Global IELTS</li> <li>- Global TOEFL</li> <li>- GRE / GMAT</li> <li>- SAT / SSTA</li> <li>- Online courses</li> </ul>
<b>Target</b>	16+
<b>Cities</b>	<p>Anyang, Anqing, Macau, Beijing, Baoding, Bengbu, Chongqing, Chengdu, Changsha, Changchun, Changzhou, Chaozhou, Cixi, Changzhi, Dalian, Dongguan, Deqing, Foshan, Fuzhou, Fushun, Fuyang, Guangzhou, Gaoyou, Guilin, Hangzhou, Hefei, Handan, Huizhou, Huai'an, Hengyang, Haikou, Harbin, Huzhou, Hohhot, Huainan, Huaibei, Jinan, Jiaxing, Jincheng, Jiangmen, Jinzhong, Jinzhou, Jiujiang, Jining, Jiaozuo, Jinhua, Kunming, Kunshan, Luoyang, Liaoyang, Luohe, Lianyungang, Liaocheng, Laiwu, Linyi, Ma'anshan, Mudanjiang, Mianyang, Nanjing, Nantong, Ningbo, Nanyang, Nanchang, Nanning, Pingdingshan, Panjin, Qingdao, Qinhuangdao, Quanzhou, Rizhao, Rugao, Shanghai, Shenzhen, Shenyang, Suzhou, Shaoxing, Shijiazhuang, Shantou, Shunde, Shangqiu, Tianjin, Taiyuan, Tanggu, Taizhou, Taizhou, Taian, Tongling, Wuxi, Wuhan, Wenzhou, Weifang, Wuhu, Weihai, Urumqi, Xi'an, Xiamen, Xingtai, Xuzhou, Xiamen, Xi'an, Xuzhou, Yantai, Yiwu, Yuyao, Zhengzhou, Zhangjiagang, Zhenjiang</p>

<sup>83</sup> Pearson APAC, (2016) b. *Pearson APAC*. [online] Pearsonapac.com. Available at: <http://pearsonapac.com/index.php?section=77> [Accessed 22 May 2016].

Overseas: Vancouver, Toronto, Sydney, Melbourne, New Zealand and London

Table 4.5.1 (c) Global Education and Technology Group Limited

#### 4.5.2 English First

*English First* is one of 16 business units that work under the global umbrella of *Education First (EF)*. *EF* was founded in 1968 in Sweden, it has its global headquarters in Lucerne, Switzerland. Today it has training centres and offices in many countries. In 1994, *EF* opened in Shanghai its first local English language training centre branch. Since then, they have expanded to over 60 cities in China, and opened over 250 schools.<sup>84</sup> Today in China, *EF* provides Aviation English language courses to several companies and organizations such as *Xiamen Airlines*, *Air China*, *China Southern*, the *Beijing Capital Airport*, *Shanghai Pudong International Airport*, and *East China Air Traffic Control*.<sup>85</sup>



#### English First, owned by Education First

<b>Website</b>	<a href="http://www.ef.com.cn/">http://www.ef.com.cn/</a>
<b>Number of centers</b>	200
<b>English Programmes</b>	Children's education centers function as loss leader to drive more customers to adult education centers. <ul style="list-style-type: none"> <li>- Youths English courses, 3 to 18 years old</li> <li>- Adult schools English courses, 19 to 40+ years old</li> <li>- Online English courses for adults</li> <li>- Corporate English</li> </ul>
<b>Target</b>	3 to 18 years old, 19+ and corporate clients
<b>Cities</b>	Beijing, Baotou, Changchun, Changsha, Changshu, Changzhou, Chengdu, Chongqing, Cixi, Dalian, Daqing, Dongguan, Dongying, Foshan, Fuzhou, Guangzhou, Guiyang, Hangzhou, Huzhou,

<sup>84</sup> EF, (2016). *History of English First - English First*. [online] English First. Available at: <http://www.englishfirst.com/ESL-Jobs/history-of-english-first/> [Accessed 22 May 2016].

<sup>85</sup> Adkins, S. (2015) c. Ambient Insight 2015-2020 China Digital English Language Learning Market Abstract p.15. Available at: [http://www.ambientinsight.com/Resources/Documents/AmbientInsight\\_2015-2020\\_China\\_Digital\\_English\\_Market\\_Abstract.pdf](http://www.ambientinsight.com/Resources/Documents/AmbientInsight_2015-2020_China_Digital_English_Market_Abstract.pdf)

Hefei, Harbin, Hohhot, Huizhou, Jiaying, Jinhua, Jinzhou, Lanzhou, Nanning, Ningbo, Nanjing, Nantong, Qingdao, Qinhuangdao, Rizhao, Shanghai, Shaoxing, Shenyang, Shijiazhuang, Suzhou, Taiyuan, Tianjin, Tangshan Taizhou, Urumqi, Weihai, Wuhan, Wuxi

Table 4.5.2 English First

### 4.5.3 New Oriental Education and Technology Group

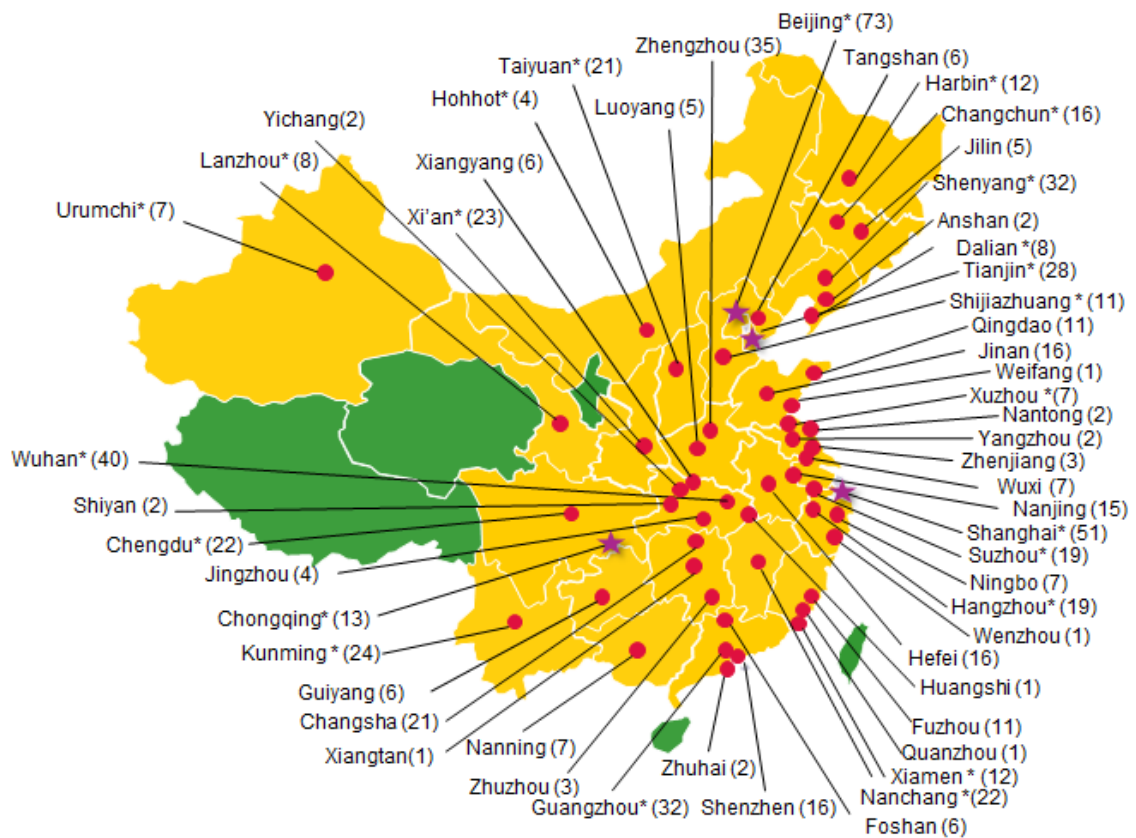


Figure 4.5.3 New Oriental Education and Technology Group's Geographic Presence in China

*New Oriental Education and Technology*, also known with the shorter name *New Oriental*, is the largest provider of private educational services in China for number of enrolments, geographic presence and programs offered.<sup>86</sup> Founded in 1993, with headquarters located in Beijing, in its early years it focused only on preparation tests for

<sup>86</sup> New Oriental, (2016). *Campus Network*. [online] Neworiental.org. Available at: <http://www.neworiental.org/english/who/201507/8213506.html> [Accessed 22 May 2016].

*GRE* and *TOEFL*. In 2006 the company was listed to the *New York Stock Exchange*.<sup>87</sup> Today *New Oriental* offers foreign language training, overseas and domestic test preparation for admissions and assessment tests, primary and secondary school education, educational content and software as well as online classes. In December 2014, *New Oriental* signed an agreement with *China Chuanglian Education Group* to supply online training programmes for professional English examinations.<sup>88</sup> In 2015 *New Oriental* counted 2.9 million enrolments, approximately 12.9 million users, and over 17,700 teachers.<sup>89</sup>



### New Oriental Education and Technology Group

<b>Website</b>	<a href="http://www.neworiental.org/">http://www.neworiental.org/</a>
<b>Number of centers</b>	64 schools 727 learning centers 23 New Oriental bookstores
<b>English Programmes</b>	Provides English language training and test preparation for students who are working towards internationally-recognised English language assessments <ul style="list-style-type: none"> <li>- Test Preparation Courses, TOEFL, SAT, ACT, IELTS, GRE, GMAT, LSAT, CET4, CET6, PETS, TOEIC</li> <li>- K-12 After-School Tutoring Courses</li> <li>- Language Training Courses for Adults</li> <li>- Primary and Secondary Schools</li> <li>- Other Foreign Language courses that includes German, Japanese, French, Korean, Italian and Spanish</li> <li>- Educational Content, Software and other Technology Development and Distribution</li> <li>- Online education</li> </ul>

<sup>87</sup> NASDAQ, (2016). *NEW ORIENTAL EDUCATION & TECHNOLOGY GROUP INC. (EDU) IPO*. [online] NASDAQ.com. Available at: <http://www.nasdaq.com/markets/ipos/company/new-oriental-education-technology-group-inc-719040-51270> [Accessed 22 May 2016].

<sup>88</sup> Adkins, S. (2015) d. *Ambient Insight 2015-2020 China Digital English Language Learning Market Abstract* p.18. [online] Ambient Insight. Available at: [http://www.ambientinsight.com/Resources/Documents/AmbientInsight\\_2015-2020\\_China\\_Digital\\_English\\_Market\\_Abstract.pdf](http://www.ambientinsight.com/Resources/Documents/AmbientInsight_2015-2020_China_Digital_English_Market_Abstract.pdf) [Accessed 22 May 2016].

<sup>89</sup> New Oriental, (2016). *Overview*. [online] Neworiental.org. Available at: <http://www.neworiental.org/english/who/201507/8213540.html> [Accessed 22 May 2016].

<b>Target</b>	6+
<b>Cities</b>	Anshan, Beijing, Baoding, Chongqing, Chengdu, Changsha, Changchun, Dalian, Fuzhou, Foshan, Guangzhou, Guiyang, Harbin, Hangzhou, Hefei, Hohhot, Huangshi, Jinan, Jingzhou, Jilin, Kunming, Lanzhou, Luoyang Nanjing, Nanchang, Nanning, Ningbo, Nantong, Qingdao, Shanghai, Shenyang, Shenzhen, Shijiazhuang, Suzhou, Tianjin, Taiyuan, Tangshan, Wuhan, Weifang, Wuxi, Urumqi, Xi'an, Xiamen, Xuzhou, Xiangyang, Xiangtan, Yichang, Yantai, Yangzhou, Zhengzhou, Zhenjiang, Zhuzhou, Zhuhai Overseas: Toronto

Table 4.5.3 New Oriental Education and Technology Group

#### 4.5.4 Disney English

*Disney English*, founded in 2008, is a subsidiary of *Disney Publishing Worldwide*' *Disney*, with headquarters located in Shanghai, China. *Disney English* offers English language training for kids of ages 2 to 12, and make use of *Disney* characters to learn. The first learning center opened in Shanghai, in the same year that the company was founded. The company and the English programs were designed to help extend *Disney's* brand in China through childhood marketing, and in preparation for the opening of the Disneyland Park in Shanghai.

		<b>Disney English</b>
<b>Website</b>	<a href="http://www.disneyenglish.com/">http://www.disneyenglish.com/</a>	
<b>Number of centers</b>	28	
<b>English Programmes</b>	Provides systematic English training program from pre-kindergarten age to primary school age. <ul style="list-style-type: none"> <li>- Hello, World</li> <li>- Scholars</li> <li>- Advanced Scholars</li> </ul>	
<b>Target</b>	2 to 12 years old	
<b>Cities</b>	Shanghai, Beijing, Guangzhou, Shenzhen, Chengdu, Nanjing, Suzhou	

Table 4.5.4 Disney English

#### 4.5.5 Best Learning

*Best Learning* is a brand owned by *China Shanghai Jingmei Business Consulting Co. Ltd.* The company was established in 2008, has today most of its centres in Beijing area and has training centres in other nine provinces. *Best Learning* offers advanced American teaching philosophy, with kindergarten American based programmes as well as primary schools programmes with only native English teachers from United States and Canada with *TESOL* licensed.

 <b>Best Learning</b>	
<b>Website</b>	<a href="http://www.bestlearning.cn/">http://www.bestlearning.cn/</a>
<b>Number of centers</b>	30
<b>English Programmes</b>	Provides subject specific curriculum (math, science etc) in English for kids 2-12 <ul style="list-style-type: none"> <li>- First Stage, 2 to 6 years old</li> <li>- Second Stage, 7 to 10 years old</li> <li>- Third Stage, 10 to 12 years old</li> </ul>
<b>Target</b>	2 to 12 years old
<b>Provinces</b>	Shanghai, Beijing, Guangdong, Hunan, Anhui, Shaanxi, Shanxi, Shandong, Zhejiang, Liaoning

*Table 4.5.5 Best Learning*

#### 4.5.6 Rise English

Rise was founded in 2007 and has headquarter located in Beijing, It was a pioneer of subject-based immersive English education company. The company offers pre-K to



Figure 4.5.6 Rise's Campuses in China <sup>91</sup>

middle school range programs with American based study curricula. Today it has 200 learning centers nationwide, having 120,000 students attending classes every day.<sup>90</sup>

91



#### Rise English

<b>Website</b>	<a href="http://www.risecenter.com/">http://www.risecenter.com/</a>
<b>Number of centers</b>	30
<b>English Programmes</b>	Provides pure American original curriculum, designed for kids and adolescents between 3 to 18 year old - 3 to 5 years old, American kindergarten curriculum

<sup>90</sup> Rise, (2016). *About*. [online] Rise center. Available at: <http://en.risecenter.com/> [Accessed 22 May 2016].

<sup>91</sup> Rise, (2016). *Campuses*. [online] Rise center. Available at: <http://www.risecenter.com/campuses/> [Accessed 22 May 2016].



	<ul style="list-style-type: none"> <li>- 6 to 12 years old, American primary school curriculum</li> <li>- 13 to 18 years old, American high school curriculum</li> </ul>
<b>Target</b>	3 to 18 years old
<b>Provinces</b>	Anshun, Anshan, Beijing, Baotou, Benxi, Baoji, Baoding, Chengdu, Changchun, Changshu, Changzhi, Chongqing, Changsha, Changzhou, Chengde, Dalian, Dongguan, Deyang, Dongying, Datong, Dandong, Ordos, Fuzhou, Foshan, Guangzhou, Guiyang, Guilin, Jiangyin, Jinan, Jining, Jinzhou, Jincheng, Jilin, Kunming, in Kunshan, Langfang, Lianyungang, Linyi, Leshan, Liuzhou, Liaoyang, Lanzhou, Hangzhou, Harbin, Hefei, Hohhot, Huai'an, Handan, Haikou, Huizhou, Hanzhong, Huludao, Heze, Hengshui, Mianyang, Mudanjiang, Nanjing, Nanning, Nantong, Nanchang, Ningbo, Nanyang, Panjin, Qingdao, Qinhuangdao, Quanzhou, Qiqihar, Shenzhen, Shanghai, Shijiazhuang, Suzhou, Shiyan, Shenyang, Sanya, Tianjin Taiyuan, Tangshan, Wuhan, Weihai, Wenzhou, Wuhu, Wuxi, Ulu, Qi wood, Weifang, Xi'an Xiangyang, Xiamen, Xuzhou, Xingtai, Yuncheng, Yanjiao, Yangjiang, Yixing, Yueyang, Yangzhou, Yichang, Yinchuan, Yantai Zhongshan, Zhenjiang, Zhuhai, Zhengzhou, Zhanjiang, Zibo, Zhangjiagang, Zhangzhou, Zhuzhou, Zunyi, Zhumadian, Zhangjiakou

*Table 4.5.6 Rise English*

#### 4.5.7 Other players

In China, parents are avid buyers for early pre-school education for their children. Therefore several players are especially concentrated in the pre-education segment. Not only Chinese citizens but also expatriates seek international pre-education for their children. It has been reported that the number of public kindergartens in the last years is shrinking while the number of private schools is growing by an average of 12 per cent a year.<sup>92</sup>

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<sup>92</sup> Adkins, S. (2015) e. *2015-2020 China Digital English Language Learning Market*. [online] Ambient Insight. P.22 Available at: [http://www.ambientinsight.com/Resources/Documents/AmbientInsight\\_2015-2020\\_China\\_Digital\\_English\\_Market\\_Abstract.pdf](http://www.ambientinsight.com/Resources/Documents/AmbientInsight_2015-2020_China_Digital_English_Market_Abstract.pdf) [Accessed 18 May 2016].

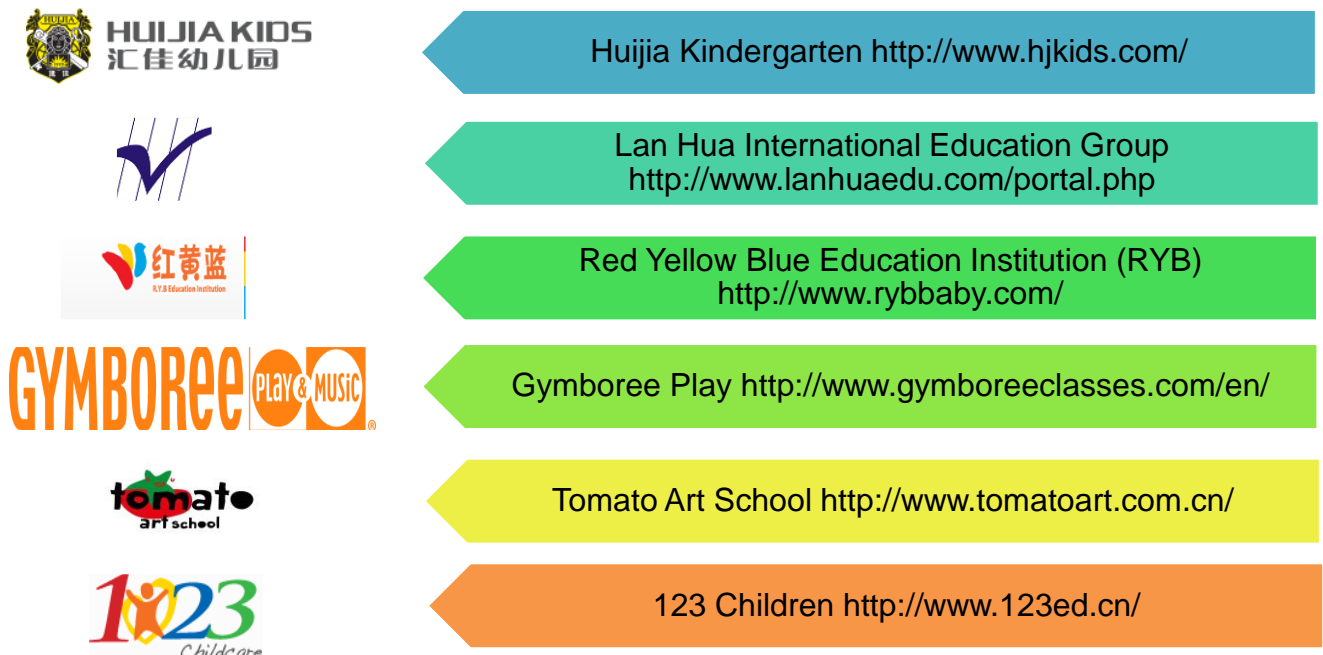


Figure 4.5.7 Kindergarten Institutions present in China

There are also publicly-traded kindergartens in China such as *Huijia Kindergarten* and *Lan Hua International Education Group*. In Figure 4.5.7 above are reported a few of the players in the pre-education segment that operate in different provinces and cities of China, such as Beijing, Shanghai and Guangdong. The figure reflects solely players' information with the aim to mention some of the known private kindergartens in China.

## 5 Correlation of English with Economic Growth, and the importance of Quality Assessment

### 5.1 How English is related to economic growth

Once a country's economy has increased its business internationally, as a consequence the need and demand for foreign languages grow. In this path the importance of speaking one or more foreign language is something that new graduates and companies are aware of. Especially today, where the economy is not just a domestic matter, when recruiting for jobs, companies seek candidates that are fluent at least in one foreign language. In China, having multilingual ability, in some sectors, is a key selection criterion and offers more chance of employability. In addition companies with multilingual personnel gain the chance to generate new opportunities and expand business horizons. Some reports and articles refer also to the benefit of mastering a foreign language which includes enhanced earnings, while speaking two or more languages is physiologically a great asset to the cognitive process of a person.<sup>93</sup> But speaking a foreign language can have as cons a negative or not worthy *ROI* to boost personal earnings<sup>94</sup>. According to *EF English Proficiency Index (EF EPI)*, study conducted by *Education First (EF)*, one of the biggest international education companies, English is becoming a basic skill for the entire global workforce. Several findings on the research show correlation between English proficiency and different aspect not only of doing business but also of better life prospects. The study found a correlation between ease of doing business with the

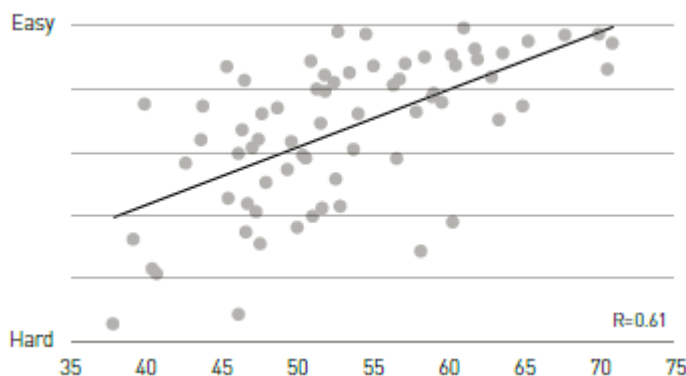


Figure 5.1 (a) English and the Ease of Doing Business Score, EF 2015<sup>95</sup>

<sup>93</sup> Merritt, A. (2013). *Why learn a foreign language? Benefits of bilingualism*. [online] Telegraph.co.uk. Available at: <http://www.telegraph.co.uk/education/educationopinion/10126883/Why-learn-a-foreign-language-Benefits-of-bilingualism.html> [Accessed 29 Jun. 2016].

<sup>94</sup> The Economist. (2014). *Johnson: What is a foreign language worth?* [online] Available at: <http://www.economist.com/blogs/prospero/2014/03/language-study> [Accessed 29 Jun. 2016].

strength of English skills of people inside the company (Figure 5.1 a),<sup>95</sup> as well as a direct correlation between English proficiency of a population and gross national income per capita of the country (Figure 5.1 b).<sup>96</sup>

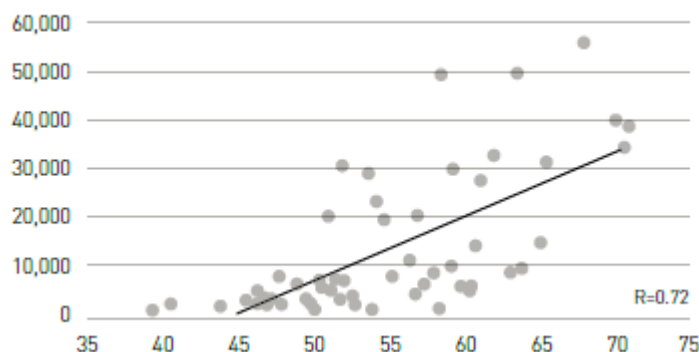


Figure 5.1 (b) Adjusted Net National Income per Capita (Current USD), English and Income, EF 2015<sup>96</sup>

Consequence of improving English proficiency not only seems, on a micro level, to drive up salaries and to raise individual standards of living, but also shows a positive correlation between economic indicators such as gross national income and *GDP*. Northern European countries comprise the top five of the *EF EPI*. Sweden has a proficiency score of 70.94, followed by the Netherlands with 70.58, Denmark 70.05, Norway 67.83, and Finland 65.32. Given their small size and export-driven economies, it could explain why English skills are a critical component of their economic success.<sup>97</sup> The *EF EPI* research also shows correlation with high-technology exports as well as larger expenditures for research and development. Moreover the report has implications for innovation since English is one of the most used language especially for international publication. The United States publishes the most scientific papers and research every year, while the United Kingdom ranks third in publication numbers, after China. However, despite its publication volume, Chinese research accounts for only 4 per cent of global citations in science publications, compared to 30 per cent for United States, and 8 per cent for the United Kingdom. This gap could be explained for different reason, for example the fact that English is one of the most spoken and used language for international communication, while Chinese requires a deep knowledge and study, but

<sup>95</sup> EF, (2015) a. *EF English Proficiency Index*. 5th ed. EF Education First Ltd., p.54. Graph A. Available at: <http://media2.ef.com/~/media/centralefcom/epi/downloads/full-reports/v5/ef-epi-2015-english.pdf> [Accessed 29 Jun. 2016].

<sup>96</sup> EF, (2015) b. *EF English Proficiency Index*. 5th ed. EF Education First Ltd., p.54. Graph B. Available at: <http://media2.ef.com/~/media/centralefcom/epi/downloads/full-reports/v5/ef-epi-2015-english.pdf> [Accessed 29 Jun. 2016].

<sup>97</sup> McCormick, C. (2013). *Countries with Better English Have Better Economies*. [online] Harvard Business Review. Available at: <https://hbr.org/2013/11/countries-with-better-english-have-better-economies/> [Accessed 29 Jun. 2016].

also the reparability of research on the online search engine, which see probably a most common use of English rather than Chinese.<sup>98</sup>

## 5.2 Correlation between English proficiency and National Income

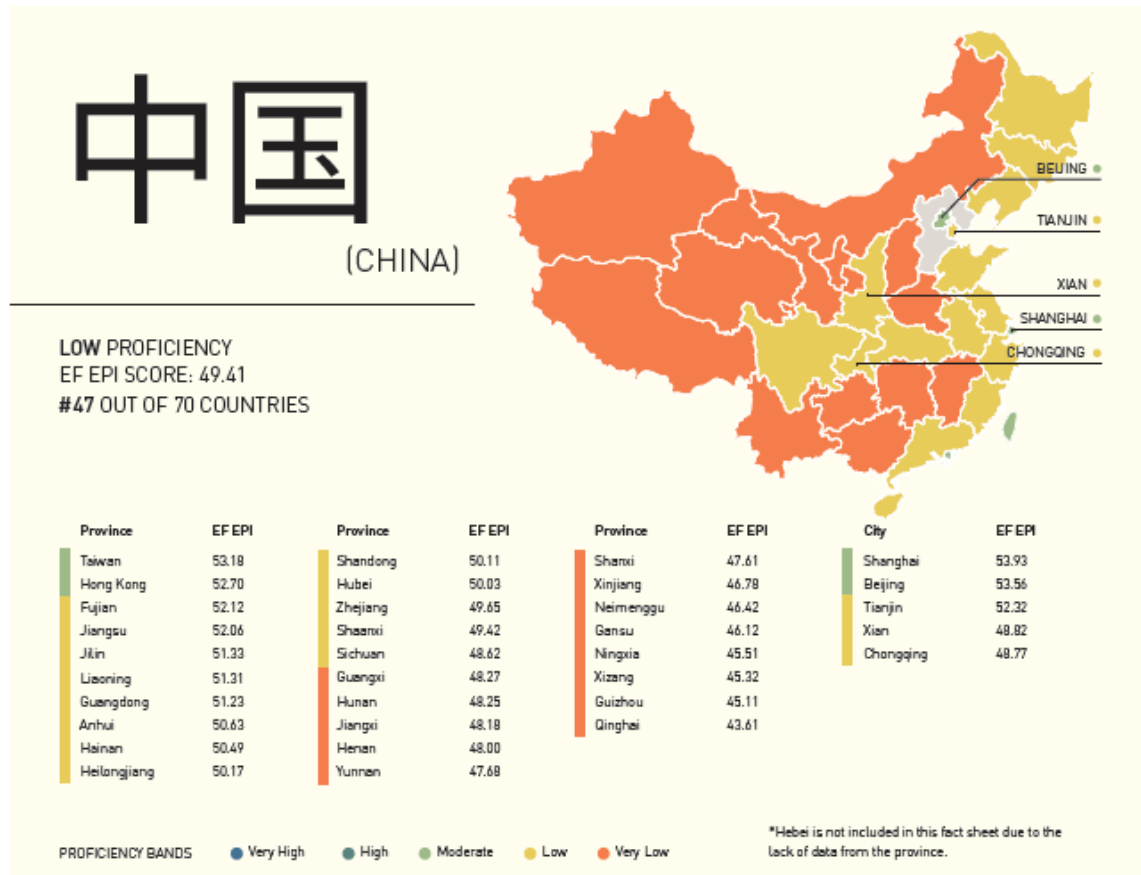


Figure 5.2 (a) China English Proficiency, EF 2015

Despite China's investments in English training, the *English Proficiency* score remains low. The cause and challenge of the struggled improvement on the overall English education and proficiency may relay on the massive population spread across urban and rural areas. Comparing the map of *China English Proficiency* (Figure 5.2 a) with the map of *Annual per Capita Income* (Figure 3.5 a) it is possible to notice a correlation between the two analyses.<sup>99</sup>

<sup>98</sup> EF, (2015) c. *EF English Proficiency Index*. 5th ed. EF Education First Ltd., p.55. Available at: <http://media2.ef.com/~/media/centralefcom/epi/downloads/full-reports/v5/ef-epi-2015-english.pdf> [Accessed 29 Jun. 2016].

<sup>99</sup> EF, (2015). *EF EPI, English Proficiency Index China*. [online] Education First Ltd. Available at: <http://www.ef.co.uk/sitecore/~/media/centralefcom/epi/downloads/fact-sheets/v5/ef-epi-country-fact-sheet-v5-cn-en.pdf> [Accessed 29 Jun. 2016].

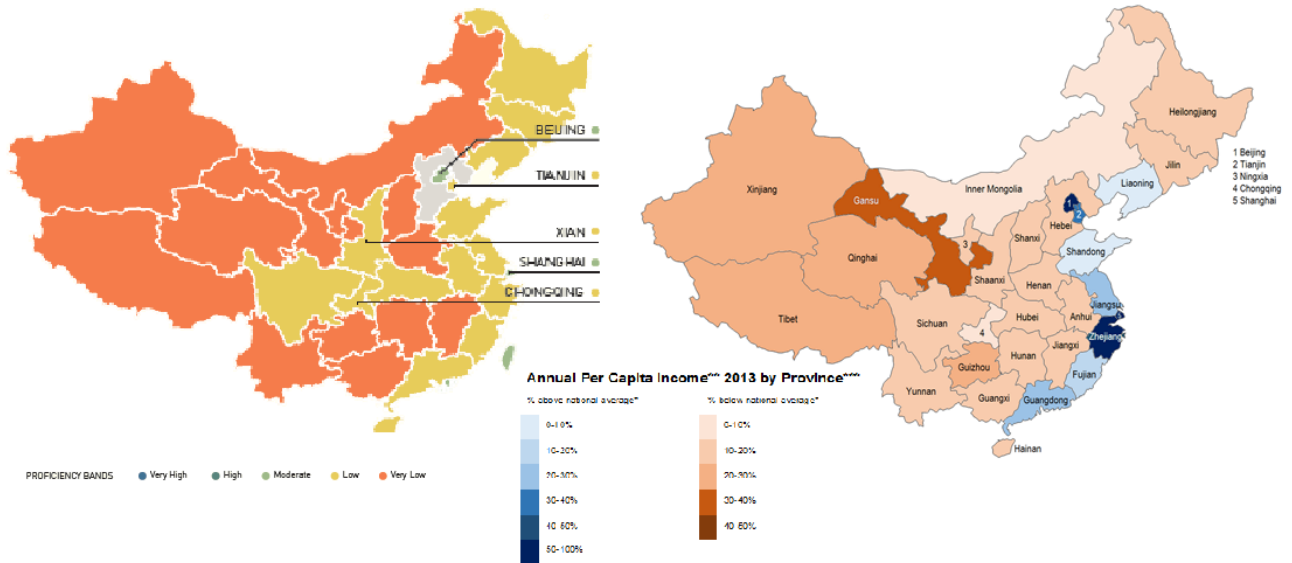


Figure 5.2 (b) China English Proficiency and Annual per Capita Income by Province

In Chapter 3 above there is analysis of the uneven gap of income per capita between urban and rural households, which has resulted also in a gap between the coastal area with the more internal and western area of China. On the proficiency map above it is possible to observe a similar trend (Figure 5.2 a). In fact cities such as Beijing and Shanghai, that are 64 per cent and 77 per cent above the national income mean, are correlated with the moderate level of English proficiency with 53.56 and 53.93 score respectively, that are also the highest score of the *EF EPI* of China. A low proficiency score but above 50 can be found in the closest coastal area provinces, and finally the very low proficiency score on the western provinces of Qinghai with the lowest 43.61 score, Guizhou 45.11, Tibet 45.32, Xinjiang 46.78, and Gansu 46.12. Data that are undeniably correlated with the lowest income percentage below the national average that accounted Gansu with minus 33 per cent, while Qinghai, Tibet, Xinjiang and Guizhou counted percentage between minus 28 to 24 per cent. According to the *EF EPI* low and very low proficiency countries display variable levels of development. In this case can be found as true that the low and very low proficiency of the western and inland areas of China correspond to the areas of the country which the government has targeted for future economy and education development.

### 5.3 Quality assessment to ensure economic growth

In China, the *Ministry of Education* draws up strategies, policies and plan for education reforms and development, while through the *Higher Education Evaluation Center (HEEC)*, one of its departments established in 2004, it evaluates and implements the quality standards, based on guidelines, regulations criteria by the *MOE*, for the setting-up of

schools of all types at various levels.<sup>100</sup> The mechanism of evaluation and implementation of quality standards down coordination between departments appears as steps in bureaucratic levels. The *HEEC* evaluation is performed through a pool of trained experts, who also collect basic institutional information such as infrastructure of college, facilities, syllabus, that are afterwards gathered together in a database. In addition the *HEEC* conducts research on policies, regulations in higher education field, in order to provide data collection for the decision making body of *MOE*. The quality assessment implemented by Chinese institutions has as its goal to encourage gradual improvement of the educational system, which appears outdated, as well as actively advise higher education institutions to set up their internal quality assurance mechanism.<sup>101</sup> China's rapid economic growth brought needs for both students and teachers, meaning that an improvement of educational standards is seen as imperative in a country driven by economic expansion. Furthermore it is undeniable that educational resources are unevenly distributed in the country, consequently poorer citizens and areas, including those areas of the country whose income per capita is below the national mean (see Chapter 3), are trailing behind in educational development, due to limited resources. Thus, it appears that there is a gap quality standards between educational institutions of any grade in the country. In addition the educational funding seems not enough to keep up with current demand. For these reasons quality should be enhanced and consolidated in order to give equal opportunities to citizens of different areas, with the aim of developing those areas that were left behind in the development process. In this regard, *UNESCO* provides guidelines that suggest how quality education could be provided in various ways by, for example, ensuring students' ideological awareness, while keeping the education public welfare oriented and so accessible to everyone by delivering equal education.<sup>102</sup>

#### 5.4 Reflection on market variables that directly or indirectly affect the quality

Outside the traditional Chinese academic system, *English language training (ELT)* is still a growing market in China. In 2010, China became the biggest *ELT* market and its value

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<sup>100</sup> MOE, (2016). *The Responsibilities of the Ministry of Education - Ministry of Education of the People's Republic of China*. [online] En.moe.gov.cn. Available at: [http://en.moe.gov.cn/About\\_the\\_Ministry/What\\_We\\_Do/201506/t20150626\\_191288.html](http://en.moe.gov.cn/About_the_Ministry/What_We_Do/201506/t20150626_191288.html) [Accessed 19 Aug. 2016].

<sup>101</sup> HEEC, (2016). *About HEEC*. [online] Pgzx.edu.cn. Available at: [http://www.pgzx.edu.cn/en/enAboutHEEC\\_d.jsp](http://www.pgzx.edu.cn/en/enAboutHEEC_d.jsp) [Accessed 19 Aug. 2016].

<sup>102</sup> UNESCO, (2010). *Outline of China's National Plan for Medium and Long-Term Education Reform and Development (2010–2020)*. [online] UNESCO. Available at: <http://uil.unesco.org/fileadmin/keydocuments/LifelongLearning/en/china-2010-abstract-III-strategy.pdf> [Accessed 19 Aug. 2016].

reached 30 billion yuan, while in 2015, it was forecasted to reach a *Compound Annual Growth Rate* of approximately 19 per cent to 2019 (see Chapter 4.2). Overseas investors are attracted by the opportunity, seeing in the country the increasing demand of local students for language training and to study abroad. By going overseas students attempt to increase their employability in a more competitive employment market, and research a better status quo, factors that stimulate otherwise the growth of *ELT* market in China. As already seen in 2016, *UNESCO Institute for Statistics* reported that the Chinese students studying abroad amounted to 712,157 including as the most common destination country such as United States, with 260,914 students, Australia, Japan, United Kingdom, South Korea, Hong Kong, France, New Zealand, Macao, and Italy (Chapter 2.4). Those students, guided by higher education in English or other foreign language abroad, are aware of better quality study programs, education experience, that respond to a lack of the Chinese education system that cannot fit with their motivation and preferences.

First-tier cities such as Beijing, Shanghai, and Guangzhou see a fierce competition, while in other big municipalities of the second-tier such as Tianjin, Chongqing, and Hangzhou, are dominated by small domestic training centers, and in many cases there is not a market leader.<sup>103</sup> Usually it is possible to notice a common strategy trend especially within the small players of the different tiers and grade of education. Small English training centers are often guided by the motivation of profitability, and they often achieve that by reducing labour costs. It is not hard to come across oversized classes in small training centers, where they maximize the profit and sacrifice the internal resources like staff, staff training, access to facilities, systems and material. This may generate in the short term immediate earnings, but in the long run it damages the business continuity. In addition it harms the quality of the service and overriding the goals of providing students with an intellectual and quality experience that help to achieve their educational goals and beliefs. In response to internal and external pressures and to the demand of stakeholders, academic institutions and language centers of any size should aim to improve the student life by increasing the quality, effectiveness and efficiency of the service. Nevertheless, assuming an increase in demand for quality of education, those institutions need a method, a self-appraisal when not required by government policy, to improve the quality. In this context Chinese consumer behaviour should be analyzed as

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<sup>103</sup> KPMG, (2011). Education in China. p.11 [online] KPMG Available at: <https://www.kpmg.de/docs/Education-in-China-201011.pdf> [Accessed 30 Jun. 2016].



a force that influences the quality assurance. In addition it must be considered that the students of the English language are not the only stakeholders: with them also parents and employees are involved in the quality analysis of the service.<sup>104</sup>

### 5.5 Three players theory

At this point of the study, it is not hard to come across to the idea in which quality is a multi-dimensional matter of different tiers of educational institution as well as it is affected by different forces.

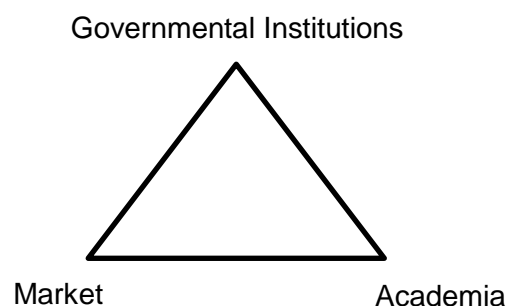


Figure 5.5 Three Player Theory, Adapted by Clark (1986) and Burke (2005) <sup>105</sup>

Governmental institutions, academia, market and stakeholders are the three forces that affect directly and indirectly the quality assurance in education, in otherwise way as well in different tiers of the education, where the private education system is no exception.<sup>105</sup>

Firstly, governmental institutions such as the *MOE*, as well as the *HEEC* and other national and local institutions, can ensure, besides control and monitor, quality assessment through regulations, guidelines, policies and reforms. Governmental institutions avail of quality assurance such as by accreditation, that is recognized by national and international institutions, depending on the level and type. For example, the *HEEC* develops international cooperation and exchanges with higher education institutions, by the evaluation six major criteria. Those criteria were set by *MOE* in 2004, reviewed in 2010, contain requirements such as faculty background and core team, daily operations, facilities and institutional budget, program structure, curricula and practical training, enrollment management, learning environment, and educational outcome

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<sup>104</sup> Cao, Y. and Li, X. (2014) a. Quality and quality assurance in Chinese private higher education. *Quality Assurance in Education*, 22(1), p.79. Available at: <http://dx.doi.org/10.1108/QAE-09-2011-0061> [Accessed 30 Jun. 2016].

<sup>105</sup> Cao, Y. and Li, X. (2014) b. Quality and quality assurance in Chinese private higher education: Quality and quality assurance in Chinese private higher education: Quality Assurance in Education: Vol 22, No 1. *Quality Assurance in Education*, pp.81.

effectiveness.<sup>106</sup> As the second force the market can influence the quality via different aspects such as the market demand. As seen in the previous chapter, the demand for English education increased exponentially in the last decades at almost every level of education. The demand for English education come across with the selection of one institution rather than another. This selection is made by a process of skimming by students or parents who select the institution and language training based on reputation, curricula, core team, teachers, on the lowest grades of education, while on higher education it could be said that is mainly related to national ranking. University ranking was first introduced to China twenty years ago and gradually become a key factor in the application of students. This ranking process got involved as well non-governmental, although recognized institution, to participate in the assessment process of quality education. As part of the market, stakeholders can indirectly affect quality assessment down public scrutiny such as the parents, prospective employers, and the society that can nowadays give feedback with different means, such as a negative comment in a social media page where reports can have an impact on further decision making of students in selection of a school. Finally, by “academia” is meant those educational institutional, public and private, professional associations, and recognized educational agencies, such as the British Council and the Cambridge Education from United Kingdom, that make efforts to ensure education quality. Other ways to have an impact on quality assessment include self-assessment and self-monitoring. Thus, educational institutions not only are following the regulation and guidelines by the *MOE*, but in addition, they go down institutional self-study where schools can identify their strengths and weakness, as well as way of implementation of quality management and teaching standards. Self-study aims to provide insight of different level of the management and administration of the schools, training center or agency, through internal appraisal, or feedback by students. All these processes allow to make changes accordingly, when necessary, and to monitor performance, and the outcome quality effectiveness.

## 5.6 English Education market problems and risks

Despite its exponential growth the English education, market continues to face several problems and risks that in the long run threatens its sustainability. One of the first issues that China's education industry has to deal with is the unequal status between private and public sectors. Official policy has been affirmed, but in practice differences remain

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<sup>106</sup> Cao, Y. and Li, X. (2014) c. Quality and quality assurance in Chinese private higher education. *Quality Assurance in Education*, Vol 22, No 1. pp. 76-81. Available at: <http://dx.doi.org/10.1108/QAE-09-2011-0061> [Accessed 30 Jun. 2016].

tangible, especially with regards to the inadequacy of certification standards in addition to a deficiency of qualified teachers.

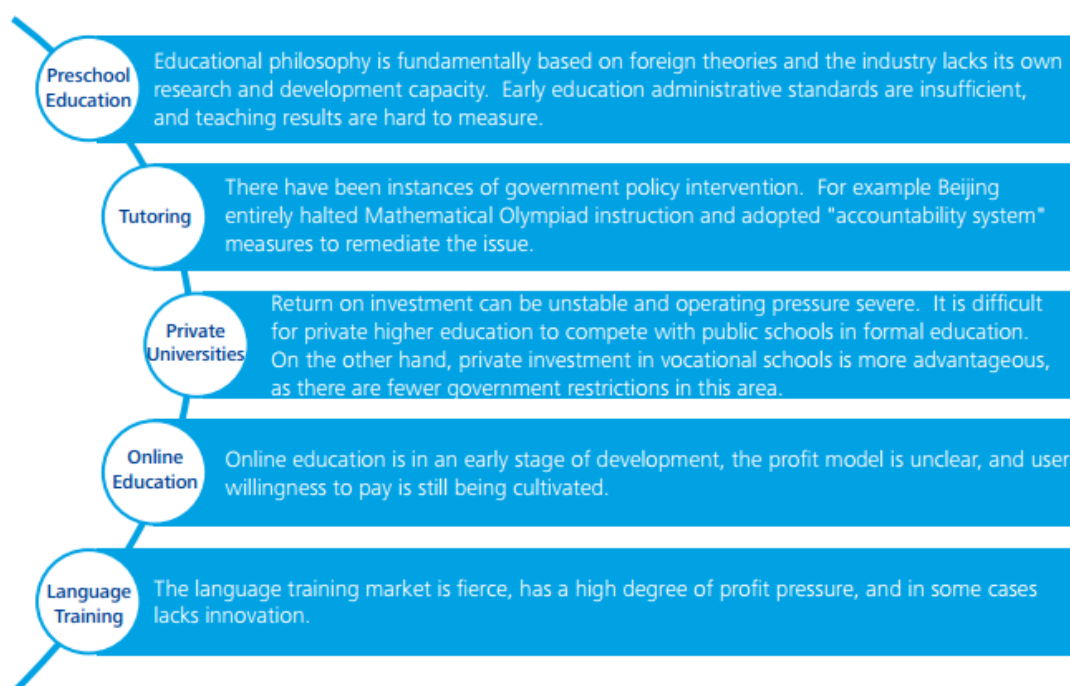


Figure 5.6 Challenges Faced by Education Market Segments in China, Deloitte<sup>107</sup>

In the above Figure, from a study by *Deloitte*, some of the challenges that the education market faces in different segment are presented. Especially in the English language teaching market, several pre-education centres are based on foreign education theory (see chapter 4.5), in regards to this the research and development of the institutions lack capacity to generate standards to monitor the efficiency of teaching. In addition, in most cases schools are small scale businesses, the administration is insufficient, most of the time underpaid and not qualified, and at the same time the teachers, even foreign, lack qualification and appropriate methodology, resulting in uncertain outcomes. This takes to a second problem, which is the lack of teacher certification standards. China currently suffers a shortage of standards for teacher certification training. Due to the low barriers to entry and recruitment of instructor lacking pre-requirements or certification, most of the time just being foreign could be a satisfactory qualification. As consequence in the

<sup>107</sup> Deloitte, (2013). *Reflections on Education and Technological Development in China 2013*. p.10 [online] Deloitte. Available at: <http://www2.deloitte.com/content/dam/Deloitte/cn/Documents/technology-media-telecommunications/deloitte-cn-tmt-reflection-edu-tech-development-china-2013-en-020513.pdf> [Accessed 30 Jun. 2016].

learning centers qualified and not qualified teachers are intermingled and the outcomes are mixed. Although, especially in the big cities, today, learning centres need to fulfil the new government restriction and requirements for new foreign teacher recruitments, there is still poor control, or ways to avoid it. One last risk that must be taken into consideration is that currently many private educational organizations run small-scale operations. Although in the short run those companies may succeed to become profitable, in the long run after expanding rapidly their business start to decline in profits, quality, and brand reputation. The decline is directly connected to the shortage of quality teachers and administrative personnel, and ultimately a shortage of resources that affects the long run operations of business repeatability and sustainability, resulting in the impossibility of expansion, or even if this is reached, failure to achieve quality outcomes.

## 6 Conclusion

Due to its crucial importance for modernization and for more global business opportunities, English language has become for Chinese governmental institutions a matter that needed to be supported by reform. The effectiveness of national economic growth and the increase of international collaborations, depend on government intervention, and within this, a gradual increase of equal opportunity among regions of the country is necessary. What is distinct is that the rapid economic growth in China brought needs at the educational level. Requirements by extra national bodies such as the *World Trade Organization*, took national institutions to undertake imperative improvement of educational standards that are seen as a crucial tool to keep up the economic growth performance. However, the quality assessment implemented by the *Ministry of Education*, and other departments, has as its goal to encourage gradual improvement of the educational system, as well as to actively advise higher education institutions to set up their internal quality assurance mechanisms. Therefore there is no evidence of direct intervention on the execution of such quality assessment.<sup>108</sup> It must be taken in consideration that the research suggests also that on current knowledge on quality assessment within the English Language education in China, the material is limited, as relatively few studies have been done outside universities and colleges. However, with the intention to find out the current situation around English Language education, and the quality assessment acted by the players, the research has led to interesting points of development and reflection. Firstly, quality is a multi-dimensional matter, mainly related to how different entities have an impact on the quality outcome, which as seen can occur in different ways at different levels, affecting the quality of the development process and the implementation of the same. A crucial turning point of the study conducted was the finding that despite the reforms undertaken by governmental institutions, still a huge part of China's territory is behind the levels achieved by the most developed coastal areas. Nevertheless, supported by the collection of statistical data, and the comparison with studies by other scholars, it was possible to alert the socio-economic disparities that still remain. The study encourages the idea that as a result of the current uneven economic development, the status of English education among the regions in China varies according to the level of development. The disparity involves also matters such as lack of budget resources, scarcity of human resource, unqualified and underpaid staff. In several educational institutions there is insufficient capacity to

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<sup>108</sup> HEEC, (2016). *About HEEC*. [online] Pgzx.edu.cn. Available at: [http://www.pgzx.edu.cn/en/enAboutHEEC\\_d.jsp](http://www.pgzx.edu.cn/en/enAboutHEEC_d.jsp) [Accessed 19 Aug. 2016].

generate standards to monitor the efficiency outcome of the operation, damaging the quality assessment process and reform undertaken by governmental institutions. What it also became evident with the progress of the study was that, despite its healthy coastal area, China suffers from alarming national income inequality. In regard to the *Income by Province* (Chapter 3.5) and to the *Gini index*, although in recent years developments reduced most of the increase in inequality that reached its high point in 2008 (Chapter 3.7), it was easy to perceive that the unequal distribution of national income is still an ongoing matter in several areas of China. Therefore, it was important to analyse the socio-economic and social values changes, to further understand how educational reform can lead to a more stable and sustainable economic growth nationwide. Furthermore it is undeniable that educational resources are unevenly distributed in the country. Consequently poorer citizens and areas, including that area of the country that see their income per capita below the national mean, are trailing behind in educational development.

In conclusion, in any level of the education, the quality assessment implementation derives from the appropriate use of reforms and guidelines set by governmental institutions, but the quality of decision making undertaken by each player, within the different education sectors, is determined by the availability of resources, in addition to organizational leadership that has impact of the business decision hence the quality outcome. To achieve sustainable results by reforms, guidelines, and further quality accreditation to obtain an effective implementation and execution of the quality assessment, there must be taken into consideration an extensive informational context such as the socio-economic status of the country. Ultimately more intervention must be undertaken by governmental institutions to reduce the quality gaps across levels of education, in addition to the economic development of the less advantaged regions of China, and promote more equitable and efficient learning opportunities through the provision of equal resources across the country.

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- <sup>2</sup> He, N. (2010). China Daily, 2010, *Rush to learn English fuels quality issues*. [online] Chinadaily.com.cn. Available at: [http://www.chinadaily.com.cn/china/2010-08/05/content\\_11098499\\_3.htm](http://www.chinadaily.com.cn/china/2010-08/05/content_11098499_3.htm) [Accessed 18 May 2016].
- <sup>3</sup> EF, (2015). *Education First, EF English Proficiency Index - EF EPI-s (for schools)*. [online] Ef.fi. Available at: <http://www.ef.fi/epi/reports/epi-s/> [Accessed 11 Nov. 2015].
- <sup>4</sup> Burke, J.C. (2005), "Achieving accountability in higher education: balancing public, academic, and market demands", Jossey-Bass San Francisco, CA, available at: [www.lavoisier.fr/livre/notice.asp?id%OLSWL6AL3K3OWU](http://www.lavoisier.fr/livre/notice.asp?id%OLSWL6AL3K3OWU) part in the analysis of Cao, Y. and Li, X. (2014). Quality and quality assurance in Chinese private higher education. *Quality Assurance in Education*, 22(1), pp. 81
- <sup>5</sup> China Gov, (2010). *Outline of China's National Plan for Medium and Long-term Education Reform and Development*. [online] Available at: [http://planipolis.iiep.unesco.org/upload/China/China\\_National\\_Long\\_Term\\_Educational\\_Reform\\_Development\\_2010-2020\\_eng.pdf](http://planipolis.iiep.unesco.org/upload/China/China_National_Long_Term_Educational_Reform_Development_2010-2020_eng.pdf).
- <sup>6</sup> MOE, (2010). *National Outline for Medium and Long-term Education Reform and Development (2010-2020)*. [online] China Ministry of Education. Available at: <http://www.moe.edu.cn/publicfiles/business/htmlfiles/moe/s3501/index.html> [Accessed 18 Nov. 2015].
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