Universität Freiburg (Schweiz)
Philosophische Fakultät
Departement für Erziehungs- und Bildungswissenschaften

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**Abstract**

This study examines the discourse on internationalization of higher education (IHE) in the Philippines. As a country that is invisible on the global higher education map, there is a lack of knowledge on how policies on internationalization of higher education can be understood in the context of the Philippines. This research therefore contributes to the scientific discussion by offering one of the first systematic analyses of the country's IHE policies, while at the same time addressing the research gap on discursive practices in IHE in the country. It employs the Discourse-Historical Approach (DHA) developed by R. Wodak and others as its methodology to reveal how a global phenomenon such as IHE is translated and articulated into the country's local frames of reference. In particular, it analyses the key topoi used in policy documents pertaining to IHE published between 1994 and 2019 and press statements released by the Commission on Higher Education from 2012 to 2019. In this study, policy is considered as texts and discourses that are in relation to one other, not in opposition. The concept of topos (topoi in plural) is understood both as the location or place of common knowledge (doxa) and the warrant or conclusion rule invoked in an argument. Thus, this dissertation focuses on the arguments used by policy makers in the policy texts to justify their claims, and how national and historical contexts interact with the global discourse to produce a specific translation, articulation, and enactment of policy. In addition, it examines how the resulting policies will impact key stakeholders in the Philippine higher education system, such as higher education institutions (HEIs), academic staff, and students. This purview also underlines the political nature of the field of higher education and IHE as a discursive space where power struggles among various policy agents and actors take place.

The primary objective of this research is to situate the Philippines in a global perspective and to recognize the impact of non-state international policy actors in the country's policy process in higher education. The Philippines' location in international politics as a peripheral country will have a crucial impact on how it construes its national identity and its role within the global community. Ultimately, this research aims to uncover the ideologies and paradigms that drive the country's internationalization of higher education, how language is strategically utilized in IHE conceived as a social practice, and how ideological positions are realized and manifested through language. This research project also responds to the need for integrating broader political perspectives into the study of IHE and its corroborating policy.

Keywords: Philippine higher education, Internationalization of higher education, Discourse-Historical Analysis, Topoi

**Zusammenfassung**

Diese Studie untersucht den Diskurs über die Internationalisierung der Hochschulbildung (IHE) auf den Philippinen. Als ein Land, das in der globalen Landkarte der Hochschulbildung unsichtbar ist, fehlt es an Wissen darüber, wie die Politik der Internationalisierung der Hochschulbildung im philippinischen Kontext verstanden werden kann. Diese Forschungsarbeit leistet daher einen Beitrag zur wissenschaftlichen Diskussion, indem sie eine der ersten systematischen Analysen der IHE-Politik des Landes bietet und gleichzeitig die Forschungslücke zu den diskursiven Praktiken der IHE im Land schließt. Sie verwendet den von R. Wodak und anderen entwickelten diskurshistorischen Ansatz (DHA) als Methodologie, um zu zeigen, wie ein globales Phänomen wie IHE in den lokalen Bezugsrahmen des Landes übersetzt und artikuliert wird. Insbesondere werden die wichtigsten Topoi analysiert, die in den zwischen 1994 und 2019 veröffentlichten Grundsatzdokumenten zur IHE sowie in den von der Commission on Higher Education von 2012 bis 2019 veröffentlichten Presseerklärungen verwendet werden. In dieser Studie wird Politik als Text und Diskurs betrachtet, die in Beziehung zueinanderstehen. Das Konzept des Topos (Topoi im Plural) wird sowohl als Ort des Allgemeinwissens (Doxa) als auch als Rechtfertigungs- oder Schlussfolgerungsregel verstanden, die in einem Argument angeführt wird. Die vorliegende Dissertation konzentriert sich daher auf die Argumente, die von politischen Entscheidungsträgern in den politischen Texten zur Rechtfertigung ihrer Ansprüche verwendet werden, und darauf, wie nationale und historische Kontexte mit dem globalen Diskurs interagieren, um eine spezifische Übersetzung, Artikulation und Umsetzung von Politik zu produzieren. Darüber hinaus wird untersucht, wie sich die daraus resultierende Politik auf die Hauptakteure des philippinischen Hochschulsystems, wie z.B. Hochschuleinrichtungen, akademisches Personal und Studierende, auswirken wird. Diese Sichtweise unterstreicht auch den politischen Charakter der Hochschulbildung und der IHE als diskursiven Raum, in dem Machtkämpfe zwischen verschiedenen politischen Akteuren und Akteurinnen stattfinden.

Das Hauptanliegen dieser Forschung ist es, die Philippinen in eine globale Perspektive zu stellen und den Einfluss nichtstaatlicher internationaler politischer Akteure auf den politischen Prozess des Landes im Bereich der Hochschulbildung zu erkennen. Die Lage der Philippinen in der internationalen Politik als ein Land in der Peripherie wird einen entscheidenden Einfluss darauf haben, wie die Philippinen ihre nationale Identität und ihre Rolle innerhalb der globalen Gemeinschaft konstruieren. Letztlich zielt diese Forschung darauf ab, die Ideologien und Paradigmen aufzudecken, die die Internationalisierung der Hochschulbildung des Landes vorantreiben, wie Sprache in der als soziale Praxis konzipierten IHE strategisch eingesetzt wird und wie ideologische Positionen durch Sprache verwirklicht und manifestiert werden.

Dieses Forschungsprojekt geht auch auf die Notwendigkeit ein, breitere politische Perspektiven in die Untersuchung der IHE und ihrer unterstützenden Politik zu integrieren.

Schlüsselbegriffe: Philippinische Hochschulbildung, Internationalisierung der Hochschulbildung, Diskurshistorische Analyse, Topoi

## **Dedication**

To Erwin.

To Kapamilya.

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# List of abbreviations

| | |
|---|---|
| ABET | Accreditation Board for Engineering and Technology |
| ACTS | ASEAN Credit Transfer System |
| ADB | Asian Development Bank |
| AEC | ASEAN Economic Community |
| AECTS | ASEAN-EU Credit Transfer Systems |
| AEP | ASEM Education Process |
| AFAS | ASEAN Framework Agreement on Services |
| AIMS | ASEAN International Mobility for Students |
| ALMM | ASEAN Labour Ministers Meeting |
| ANZCERTA | Australia-New Zealand Closer Economic Relations Trade Agreement |
| APAEI | Asia-Pacific Association for International Education |
| APEC | Asia-Pacific Economic Cooperation |
| APSC | ASEAN Political-Security Community |
| AQF | ASEAN Qualifications Framework |
| AQRF | ASEAN Qualifications Reference Framework |
| ARC | ASEM Rectors' Conference and Students' Forum |
| ARF | ASEAN Regional Forum |
| ASCC | ASEAN Socio-Cultural Community |
| ASEAN | Association of Southeast Asian Nations |
| ASEAN QA | ASEAN Quality Assurance |
| ASEF | Asia-Europe Foundation |
| ASEM | Asia-Europe Meeting |
| ASIE | Association for Studies in International Education |
| AU | African Union |
| AUN | ASEAN Universities Network |
| CAMESES | Conseil Africain et Malgache pour l'Enseignement Superieur |
| CBIE | Canadian Bureau for International Education |
| CCFTA | Canada-Chile Free Trade Agreement |
| CDA | Critical Discourse Analysis |
| CDS | Critical Discourse Studies |
| CEDEFOP | European Centre for the Development of Vocational Training |
| CF | Campus France |
| CGACC | Center for Global Advancement of Community Colleges |
| CTS | Council for Trade in Services |
| DA | Dublin Accord |
| DAAD | Deutsche Akademische Austauschdienst |
| DHA | Discourse Historical Analysis |
| EACEA | Education, Audiovisual and Culture Executive Agency |
| EAIE | European Association for International Education |
| ECTS | European Credit Transfer System |
| EHEA | European Higher Education Area |
| EHEF | European Higher Education Fair |
| EMA-SEA | Erasmus Mundus Association-Southeast Asia Region |
| ENLANCES | Latin America and the Caribbean Area for Higher Education |
| ENQA | European Association for Quality Assurance in Higher Education |
| EQAR | European Quality Assurance Register for Higher Education |
| ERASMUS | European Region Action Scheme for the Mobility of University Students |

| | |
|---|---|
| ESN | Erasmus Student Network |
| ESU | European Student Union |
| ETF | European Training Foundation |
| EU | European Union |
| EUA | European University Association |
| EUMOA | West African Economic and Monetary Union |
| EU-SHARE | European Union Support to Higher Education in the ASEAN Region |
| FTA | Free Trade Agreement |
| GATS | General Agreement on Trade and Services |
| HE | Higher Education |
| HEIs | Higher Education Institutions |
| IaH | Internationalization-at-Home |
| IAU | International Association of Universities |
| ICT | Information and Communication Technology |
| IE | International Education |
| IEA | International Engineering Alliance |
| IHE | Internationalization of Higher Education |
| ISCED | International Standard Classification of Education |
| IUA | International Universities Association |
| JSIE | Journal of Studies in International Education |
| KBE | Knowledge-Based Economy |
| LMD | Licence - Master - Doctora |
| MNC | Multinational Companies |
| MOOCs | Massive Online Open Courses |
| MRA | Mutual Recognition Agreement |
| NAFSA | National Association for Foreign Student Affairs |
| NAFTA | North American Free Trade Agreement |
| NMM | Neoliberal Market Mode |
| NPM | New Public Management |
| OBE | Outcome-Based Education |
| OECD | Organisation for Economic Co-operation and Development |
| PISA | Programme for International Student Assessment |
| PPP | Private-Public Partnership |
| QA | Quality Assurance |
| QS | Quacquarelli Symonds |
| REESAO | Network of Excellence in Higher Education in West Africa |
| RIHED | Regional Institute of Higher Education and Development |
| SA | Sydney Accord |
| SDG | Sustainable Development Goals |
| SEA | Southeast Asia |
| SEA-HiEd | Southeast Asian Higher Education |
| SEA-HiEd SOM | Southeast Asian Higher Education Senior Officials Meeting |
| SEAMEO | Southeast Asian Ministers of Education Organisation |
| SEAMEO-RIHED | Southeast Asian Ministers of Education Organisation - Regional Institute of Higher Education and Development |
| SIL | Summer Institute of Linguistics |
| STEAM | Science, Technology, Engineering, Agriculture and Mathematics |
| STEM | Science, Technology, Engineering, and Mathematics |
| TAC | Treaty of Amity and Cooperation |
| TNC | Transnational Companies |

| | |
|---|---|
| TNE | Transnational Education |
| TQM | Total Quality Management |
| UCTS | University Credit Transfer Scheme |
| UDUAL | The Union of Latin America and the Caribbean Universities) |
| UIS | UNESCO Institute for Statistics |
| UK | United Kingdom |
| UMAP | University Mobility in Asia |
| UN | United Nations |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |
| UPDA | Qatar Urban Planning and Development |
| US | United States |
| USA | United States of America |
| WA | Washington Accord |
| WB | World Bank |
| WPDR | Working Party on Domestic Regulations |
| WPPS | Working Party on Professional Service |
| WTO | World Trade Organization |
| WWII | World War II |

## Abbreviations used in the Philippines

| | |
|---|---|
| AACCUP | Accrediting Agency of Chartered Colleges & Universities of the Philippines |
| ACSCU | Association of Christian Schools, Colleges and Universities |
| ACSCU-AAI | Association of Christian Schools, Colleges & Universities Accrediting Agency, Inc. |
| ALCU | Association of Local Colleges and Universities |
| ALCUCOA | Association of Local Colleges & Universities Commission on Accreditation |
| ALS | Alternative Learning System |
| APPTI | Association of the Philippine Private Technology-Based Institutions |
| ARMM | Autonomous Region of Muslim Mindanao |
| AY | Academic Year |
| BEP | Bilingual Education Policy |
| BI | Bureau of Immigration |
| CEAP | Catholic Educational Association of the Philippines |
| CEB | Commission En Banc |
| CHEd | Commission on Higher Education |
| CHED-IAS | Commission on Higher Education-International Affairs Staff |
| CMO | CHEd Memorandum Order |
| COCOPEA | Coordinating Council of Private Educational Associations |
| COD | Center of Development |
| COE | Center of Excellence |
| CONTEND | Congress of Teachers and Educators for Nationalism and Democracy |
| CPI | Calatagan Pot Inscription |
| DBM | Departmet of Budget and Management |
| DEPED | Department of Education |
| DFA | Department of Foreign Affairs |
| DILA | Defenders of the Indigenous Languages of the Archipelago |
| DOLE | Department of Labor and Employment |

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|---|---|
| DOST | Department of Science and Technology |
| DTI | Department of Trade and Industries |
| EDCOM | Congressional Commission on Education |
| EO | Executive Order |
| FAAP | Federation of Accrediting Associations of the Philippines |
| FAPE | Fund for Assistance to Private Education |
| FHEPs | Foreign Higher Education Providers |
| IACFS | Inter-Agency Committee on Foreign Students |
| JIP | Journal Incentive Program |
| JMO | Joint Memorandum Order |
| KWF | Komisyon sa Wikang Filipino (Commission on the Filipino Language) |
| LCI | Laguna Copperplate Inscription |
| LUCs | Local Universities and Colleges |
| MO | Memorandum Order |
| MOC | Memorandum of Contract |
| MOI | Medium of Instruction |
| MOU | Memorandum of Understanding |
| MSU | Mindanao State University |
| MTB-MLE | Mother-Tongue Based Multilingual Education |
| NBI | National Bureau of Investigation |
| NCR | National Capital Region |
| NEDA | National Economic and Development Authority |
| NICA | National Intelligence Coordinating Agency |
| NNQAA | National Network of Quality Accrediting Agencies |
| NSC | National Security Council |
| NSP | National Security Policy |
| NSS | National Security Strategy |
| OFWs | Overseas Filipino Workers |
| OJT | On-The-Job Training |
| PAASCU | Philippine Accrediting Association of Schools, Colleges and Universities |
| PACU | Philippine Association of Colleges and Universities |
| PACUCOA | Philippine Association of Colleges & Universities Commission on Accreditation |
| PAPSCU | Philippine Association of Private Schools, Colleges and Universities |
| PASUC | Philippine Association of State Universities and Colleges |
| PCARI | Philippine California Advanced Research Institute |
| PCER | Presidential Commission on Educational Reform |
| PDP | Philippine Development Plan |
| PESS | Philippine Education Sector Study |
| PHEIs | Philippine Higher Education Providers |
| POEA | Philippine Overseas Employment Administration |
| PQF | Philippine Qualifications Framework |
| PRB | Professional Regulatory Board |
| PRC | Professional Regulations Commissions |
| PRs | Press Releases |
| PSA | Philippine Statistics Authority |
| PSGs | Policies, Standards and Guidelines |
| R.A. | Republic Act |
| SC | Supreme Court |
| SHS | Senior High School |

| SUCs | State Universities and Colleges |
| SWP | Special Worker Permits |
| TESDA | Technical Education and Skills Development Authority |

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## 1. Introduction

Internationalization is a major phenomenon that bears imprint on 21st century higher education policies and practices; it has moved from the peripheries to the mainstream of international higher education scholarship and debates (Phillips & Schweisfurth, 2014; Deardoff, de Wit & Heyl, 2012). Internationalization of higher education, or IHE, has also resulted in new global norms as well as new regional constellations in the field. As a discipline, it covers diverse themes and geographical foci, reflecting the different concepts and paradigms employed to capture and explain its complexity. As a phenomenon, it stands at the nexus of contestations, such as on the evolving roles of higher education institutions and the nation-state. Higher education, in general, has also become a centerpiece of national policies, particularly in the context of economic development. While internationalization activities are linked to the expansion of higher education institutions across the globe, their rationales are anchored on specific imaginaries about globalization (Rizvi, 2007). Thus, these fundamental transformations do not happen in a vacuum, but within geo-political processes and spaces. Similarly, IHE is a field of globalized policy discourses marked by differential power positions and relations (Lomer, 2017, p. 25). National policies, on the other hand, are formulated within a global context influenced by a flux of ideas, values, and assumptions. Conversely, a country's commitment to IHE is part of a globalized discourse that privileges internationalization as a policy instrument to pursue nation-states' self-interests (p. 25). Further, Lomer (2017) argues that globalization and internationalization of higher education create a shared discursive policy space where higher education institutions compete and collaborate, whereby:

> […] participating states acquiesce in certain norms, structures and rules…. Countries comply with the value judgements implicit in shared norms through funding arrangements, provision of data and so on… International higher education is disciplined by multiple intersecting structures and is entrenched in neo-colonial power flows (pp. 27-28).

Thus, Lomer (2017) concurs with Lingard (1996) who argues that "policy analysis needs to be aware of how the global context is constructed within policy texts as a rationale for particular policy imperatives" (p. 76). As such, it is marked by several discourses that are in some ways entangled with each other. Thus, politics and operations of contemporary public policy can neither be sufficiently explained by the notions of scale (e.g. local, regional, national and global) nor by the idea of the rescaling of statehood (Gulson, Lewis, Lingard, Lubienski, Takayama & Webb, 2017, p. 225). This emphasizes the fluidity of policy and "the spatiality of policy relations" (see also Gulson et al, 2017, p. 226). It also illustrates how policy ideas circulate and the scope of their influence on social practices. In other words, IHE is a socio-political space where

discourse and ideas, materials, and people flow; these flows actively constitute the power relations in, and at the same time define, the IHE landscape (Gulson et al, 2017, p. 226). Although there is a common agreement in the academic community that the phenomenon of internationalization has spread across the globe, the speed, scope, and depth of the responses and (re)actions vary from government to government (cf. Rumbley, Altbach & Reisberg, 2012). This is particularly true in regard to 'emerging' or 'developing' countries that continue to occupy the fringes of the global higher education circuit, such as the Philippines.

## 1.1. Current state of internationalization in the Philippines

On 11th November 2016, the Commission on Higher Education (CHEd) officially published the Philippine's key policy document on internationalization of the country's higher education system. This move came after the declaration of the official establishment of the Association of Southeast Asian Nations (ASEAN) Economic Community (AEC) on 22nd November 2015. In 2013, the government began to restructure the whole educational system from kindergarten to higher education by adapting the K-12 model (Commission on Higher Education [CHEd], 2016). Technically, the reform's scope does not include the tertiary level. In practice, however, it has ramifications for higher education institutions. In its Memorandum Number 55, Series of 2016, the CHEd argued that this reform is the country's response to the demands of globalization processes, such as the mobility of individuals and the development of a knowledge-based economy. Subsequently, the CHEd has issued policy documents in recent years to prepare the sector to engage in internationalization. These policies have particularly focused on establishing quality assurance standards through a learning competency and outcomes-based system of typology of HEIs to align the sector with economically developed countries and with international standards of select professions (CHEd, 2012, CMO 46). In a series of press releases in 2017, the CHEd continued to prove its commitment to spearheading the internationalization activities of the sector. For example, the CHEd conducted and organized several conferences focusing on diverse topics in higher education, such as gender equality and mainstreaming, best practices in strategies, as well as trends in leadership and governance. These activities were part of the Philippine's chairmanship of the 31st ASEAN Summit. Entitled "Partnering for Change, Engaging the World," the summit, the chairmanship, and its key activities were a good augury for the country's internationalization efforts (www.asean2017.ph). The CHEd has also signed cooperation agreements with Southeast Asian countries, as well as other countries such as New Zealand, France, the United Kingdom (UK), Canada, Russia, Turkey, and the United States of America (USA), in the areas of qualification frameworks, scholarship grants, mobility, research and development, training of HE administrators in international policies, and similar activities. More recently, the CHEd embarked on a nationwide mentoring initiative to support Philippine HEIs to develop their

internationalization strategies and to provide assistance in program planning (CHEd PR, 2019b). The CHEd also promotes its collaboration with the UK as one of its key strategies in internationalization and in developing a more globally competitive higher education sector (CHEd PR, 2019a).

## 1.2. Problem statement

In a conference organized by the University of the Philippines (UP) in 2015, approximately 80 administrators from 24 HEIs confirmed their commitment to internationalize and improve the quality of higher education in the country by seeking the support of the CHEd in developing strategies for internationalizing Philippine HEIs (UP, 2015). However, such a statement needs to be taken with a grain of salt. Considering the size of the Philippine higher education landscape, one needs to question the degree of representation in such claims. For instance, during one of the discussions with my resource persons conducted between 2013 and 2017, one higher education administrator asked which HE institution could meaningfully participate in the process. As an administrator of a reputable private institution, this administrator expressed concerns over fairness in terms of access to government resources, both financial and nonfinancial (Resource person 1). Another administrator of a local university explicitly rejected the need to internationalize, contending that his university's mandate is to provide education to its constituents so they can find employment in the local labor market. An exception is in the fields of nursing and engineering, in which this particular university seeks to comply to international standards (Resource person 2). In relation to international standards, a public servant stated that they are superfluous to the Philippine context, and are only relevant if one seeks work overseas (Resource person 3). Additionally, at the height of the K-12 debates in 2015, a faculty member of a public university asked what the cost of internationalization is in relation to the purpose of higher education, particularly in promoting national identity (Resource person 4). Although these statements only provide a snippet of a highly complex situation, they do indicate nebulous ideas about internationalization as a concept and an ambivalent attitude towards internationalization as a localized or contextualized phenomenon. Furthermore, the initiatives of the CHEd steer the Philippine higher education towards a specific internationalization agenda. Thus, these issues raise the question of how the Philippine government, through the CHEd, translates the phenomenon of internationalization in the Philippine context and what the implications for the higher education sector are. In a heterogenous higher education landscape such as that of the Philippines, where quality, access, and outcomes are directly linked to students' social and cultural capitals in a Bourdieunian sense, it is crucial to examine the rationales that drive internationalization policies, these policies' impacts on practices on the ground, and the outcomes for various stakeholders, such as HEIs and their students, faculty, and staff.

### 1.2.1. The neoliberal agenda

Another issue that is under-examined in the context of internationalization is the neoliberal ideas that are embedded in the phenomenon (Bamberger, Morris & Yemini, 2019). Hans de Wit (2018) describes this tension as the paradox of cooperation and competition against the backdrop of increasingly inward-looking political trends (de Wit, 2018). In the case of the Philippines, Mongaya (2016) noted how the impetus to reform the education system and internationalize the higher education sector are driven by an agenda "to further align it to the market logic of profit accumulation" (para. 16). Mongoya (2016) argued that the revisions in the higher education general curriculum, particularly the reduction of general education programs from 45 units to 21 units by eliminating Filipino language, history, and literature, undermine the development of national awareness, students' critical thinking, and the ability of the Filipino youth to think and express themselves in the vernacular. This move, according to Mongoya, aims to sustain the labor export program of the government by aligning the country's education sector to the needs of transnational companies (TNCs) and "purging of all nationalist and critical thinking in the academe" (2016, para. 19). Here, Mongoya makes direct references to several education issues in the country: the privatization of education (particularly higher education), labor migration as an outcome of higher education (education for migration), labor export as a national economic policy, and a school curriculum that remains uncritical of its former colonizers, especially the USA (Maca & Morris, 2012).

Another point of contention focuses on shifting the academic calendar to synchronize with other universities overseas. The CONTEND, or Congress of Teachers and Educators for Nationalism and Democracy (2014) opposed the shift, naming the act as a neoliberalist attitude towards internationalization because it undermines the local agriculture cycle on which the old calendar was based, thus affecting the work rhythm of the farmers and indigenous population. The group further argued that the shift alone does not promote internationalism and global competitiveness because both require a far-reaching re-structuring of academic content, teaching, and research (cf. Villafuerte II, Juanillo & Hilario, 2016). In a statement addressed to the students of the 105th graduation ceremonies of the University of the Philippines, the CONTEND described the calendar shift as "one of the most jarring and disorienting effects of the university's continuing project of neoliberal internationalization" (CONTEND, 2016, para. 2). Although these discourses emanate from the University of the Philippines, the country's only national university, they have considerable influence on public opinion on the issue. Similarly, Doloricon (2015) lamented that the adoption of outcomes-based education (or OBE) shifts the purpose of education to developing skills and competencies for the benefit of the global and knowledge-based economy. In EU parlance, learning outcomes are defined as "statements of what a learner knows, understands and is able to do on completion of a learning

process" and must include assessment mechanisms that measure outcomes (ESCOpedia, 2020, para. 1). William Spady (1994) conceptualized OBE to respond to the changing needs of US society. As such, OBE focuses on individual achievements and puts the learner at the center – an idea based on individual freedom and rights to ownership. This orientation, according to Doloricon, corrodes the spirit of collectivism that operates in complex Asian societies such as the Philippines (2015, para. 13; see also Maca & Morris, 2012). Regarding the KBE, or the knowledge-based economy, in the context of Southeast Asia, Welch (2013) noted that discourses on KBE have ignored the fractures that the KBE has created between the "knowledge haves" and the "have nots" (p. 201) and the effects on the material conditions of particular groups.

> Major clefts in the knowledge economy mean that certain groups miss out on the much-touted benefits of higher wages, more job satisfaction and greater autonomy. In particular, less-skilled (less educated) workers, and all those who lack the capacity to bargain for better benefits, because their skills are in less demand than others, tend to miss out. This includes groups such as indigenous workers, recently arrived migrants, select ethnic minority communities, rural dwellers, part-time and contract workers (often women), and others at the base of the socio-economic pyramid (Welch, 2013, p. 200).

Thus, the focus on ICT and the pursuit of transforming economies into knowledge-based economies have resulted in the exclusion of particular groups from gainful and equitable economic participation. These concerns are closely linked to the marketization or commodification of higher education. As illustrated in the vignettes, the contestation is neither about higher education as public vs private good, nor about the legitimacy of overseas labor migration as a national policy. Rather, the discourse focuses on the implications and consequences of internationalization on the public and society. In the Philippines, privatization of higher education developed much earlier than the public higher education system. The University of Sto. Thomas, a private Catholic university, was established in 1611, long before the University of the Philippines, which was founded only in 1908. Since the government is unable to meet the ever-increasing demand for higher education, the private sector has actively responded to the service gap. In fact, in the academic year 2016/2017, there were only 233 public institutions of higher education, compared to 1,710 private HEIs. The main issue that this raises relates to the price tag of higher education and who pays for it because a majority of the private HEIs operate as businesses financed through tuition fees collected from students. Thus, the main contention in the context of internationalization is the question of who benefits. For example, who benefits if the country synchronizes its academic calendar with the Western

system? Who benefits from an internationally orientated curriculum? Who benefits from international standards and outcomes-based curricula? With 16.7% of the population living below the poverty line in 2018 (Philippine Statistics Authority [PSA], 2020), the concern about the cost of higher education is compelling and appertain to questions of access to quality education. Thus, issues of inequality become magnified through the lens of differential knowledge production in economically poorer countries such as the Philippines (Altbach, 2004). Further, as the country, through the CHEd, aggressively moves towards reforms to be able to engage in internationalization activities, there is a concern that these will shift the cultural and social values based on the demands and exigencies of the global labor market. Thus, there is a mistrust in the process based on the notion that the aims of internationalization will undermine the tradition of liberal education in the country.

However, as Windle (2019) argues, one has to take the contextual specificities into account to understand the distinctive forms and historical expansion of neoliberalism, especially in the Global South. Focusing solely on neoliberal critique as the main analytical model – developed in the Global North – is insufficient (pp.191-192). In other words, scholars also need to access various conceptual resources such as non-economic dimensions of power, geopolitical relationships, and cultural logic to better comprehend the complex process of the production and reproduction of inequalities in education.  Such a multi-scale perspective places education at the nexus of multiple poles and locations of power and authority (p. 195).

### 1.2.2. Epistemic neocolonialism

The CHEd's emphasis on international standards and global competitiveness as rationales for OBE assumes that Filipino graduates will gain equal status with other graduates of the same field from other countries. This assumption stems from the persistent problems of recognition of academic credentials faced by Filipino professionals abroad. For example, in 2016, the CHEd intervened when around 12,000 Filipino engineers and architects were prevented from registering with Qatar's Urban Planning and Development Authority (UPDA) because their Bachelor's degrees were not formally recognized as such, but only as the equivalent to a diploma. This decision was mainly based on the 10-year basic education cycle in the Philippines, and not on the level of their skills and competencies as engineers (CHEd, 2016a). For the CHEd, this situation underlines the need to align the country's education system to global or international standards.

Elsewhere, I offer my critical reflections on the serious implications of articulating international standards from the perspectives of a labor-sending country such as the Philippines. Taking nursing education as an example, I problematize the complicity of the CHEd and the technical

panels, despite their noble intentions, in the 'production' of the Filipina/o global worker, thus reifying the culture of labor migration in the country (Eder, 2016). As Shahjahana and Morgan (2016) contend, the notion of global competition creates socially construed global spaces of equivalence that value particular models and templates (i.e., quality assurance, benchmarking, international standards) "derived from historically epistemically privileged positions" of powerful Anglo-American universities (p. 96). For nation-states that have yet to fully integrate in the international higher education arena, such as the Philippines, the promises of participation in the competition justify the assimilation of these models and templates into their systems. However, the playing field is never equal between economies, thus the competition is not a fair one. The authors further argue that the participants', i.e., institutions, individuals, or nation-states, desire to be a part of this global competition is rooted in coloniality as they aspire for recognition from the West.

In their content analysis of the themes and concepts that have marked the discourse on internationalization of higher education in the *Journal of Studies in International Education* (JSIE)[1] from 1997 to 2016, Bedenlier, Kondakci, and Zawacki-Richter (2017) show that research published in the journal has been largely Anglo-Saxon and Western European "in content as well as in disseminating a certain understanding of internationalization" (p. 21). Citing Ogachi (2009), who wrote about the case of East African higher education, Bedenlier et al (2017) contend that:

> […] internationalization is not solely beneficial but also serves to maintain, for example, emerging countries' dependency on the core higher education systems or impedes quality assurance based on locally appropriate measures due to focus on seemingly global standards […] (p. 21).

This highlights the epistemological hegemony of Western societies in defining the parameters of internationalization and in construing international standards. Although research outputs that focus on countries and regions beyond the Western European and Anglo-Saxon contexts are increasing (from 15 in 2007 to 49 in 2016), there is still a lacuna on critical and self-reflexive research on how internationalization contributes to inequality and dependency between higher education systems, and how Western concepts continue to dominate the field (Bedenlier et al, 2017, p. 21).

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[1] JSIE is published in association with Association for Studies in International Education which is composed of 12 organizations based in several continents, all actively working in the field. Metrics used by its publisher indicate that in 2015 JSIE has an Impact Factor of 1.066 and ranked 91st out of 231 other journals in Education & Educational Research. Statistically, this indicate the relative significance of the journal in the academic community (https://uk.sagepub.com/en-gb/eur/journal-of-studies-in-international-education/journal201378).

Correspondingly, Aw (2017) calls for a closer interrogation of the fundamental paradigms that drive the phenomenon of internationalization and their outcomes. She points to the unidirectional flows of power relations that are overlooked in internationalization practices, citing the dominance of the Western culture and the status of the Western model as 'modern,' establishing itself as the standard (also de Wit, Gacel-Ávila, Jones & Jooste, 2017). Aw further argues that "Internationalization practices are not value-neutral and cannot be devoid of cultural dimensions" (2017, p. xxii). This underlines the need to contextualize internationalization, both in conceptual and practical terms. Scholars and practitioners therefore need to account for the specificities of the environment where internationalization emanates from and aims to benefit. "It is important for internationalization efforts to remain contextualized and rooted in culture, place, time and manner" (p. xxii). These statements are critical, particularly for the goals of this research. They explicitly acknowledge, and thus problematize, the power that emanates from what Altbach (2001) calls the academic centers to the countries in the periphery, such as the Philippines. They bring to light the challenges that arise when concepts such as international higher education and internationalization become global and assume to stand for a uniform set of ideas and practices. Likewise, Aw's call speaks to the process of inclusion/exclusion that marks international activities such as partnerships, networks, and mobilities. Thus, scholars need to shift the purview of the discourse on globalization of higher education or internationalization to the impacts of dominating globalization paradigms that drive national and institutional policy frameworks, strategies, activities, and outcomes (Egron-Polak & Marmolejo, 2017).

## 1.3. Research questions

In the context of the above, this dissertation focuses on internationalization of higher education in the Philippines. It examines the concepts used in translating the internationalization discourse into the country's local frames of reference. The Philippine 1987 Constitution is the core basis of major public policies in the country. It is the key reference for formulating legislation at all levels, especially the national development goals. In higher education, the main policy actor is the Commission on Higher Education (CHEd). Basing its powers and functions in the Philippine constitution, the CHEd as an agency of the Philippine government, has the mandate to formulate and implement policies and strategies on higher education as well as to set the standards for programs and operations of HEIs (www.ched.gov.org). Thus, the internationalization policy issued by the CHEd will, by and large, strongly influence HEIs' operations and practices on the ground in regard to internationalization. Similarly, the first piece of national legislation that speficially referred to IHE is the Transnational Higher Education Act, or Republic Act No. 11448, which came into effect on August 28, 2019 and will be the CHEd's

basis for implementing TNE programs in the country. I formulate my research questions along the critical perspectives hitherto discussed:

1) What discourse strands can be identified from the country's internationalization policy documents?
2) How can the internationalization policies be discursively interpreted and understood?
3) How do they impact discursive practices in internationalization of higher education in the Philippines?

## 1.4.    Research purpose

The main purpose of this research is to bring to light the ideologies and paradigms that drive the country's internationalization of higher education policy. Additionally, it aims to highlight the relevance of socio-historical contexts in which the policy is constructed and the interplay between the global and the local in the IHE practices of the Philippine higher education sector. The issues discussed above are of critical relevance to the Philippines. Its location in international politics as a peripheral country will have a crucial impact on how it construes its internationalization policy and in understanding its role within the global community.

In this research, I employ the idea of IHE as a discursive space where power struggles among various policy agents and actors take place. Thus, I focus on the how, or the process of knowledge (re)production and mobilization in and through IHE, to legitimize what Foucault refers to as 'regimes of truth' (Ball, 2015). Further, this approach helps to situate the conditions in the Philippines in a global perspective and to recognize the impact of supranational and international organizations as well as regional blocs in the policy process in the country. On the other hand, I also acknowledge the volition of political and non-political actors and agents, and their forms of (dis)engagements and/or resistance/refusal in the policy process. To achieve my research goals, I employ Critical Discourse Studies in my research methodology, particularly the Discourse-Historical Approach. Critical Discourse Studies, or CDS, is an emerging methodological approach in the study of higher education policy. The use of CDS assumes that higher education is a social practice that takes place within social, historical, and political contexts (Hyatt, 2013, p. 43). Borrowing from Ball (2015), I consider policy as text and discourse (p. 307). Text and discourse are in relation to one other, not in opposition. CDS thus offers a fertile ground for examining and analyzing textually oriented discourses, specifically in regard to how language is strategically utilized in social practices and how ideological positions are realized and manifested through language (Hyatt, 2013, p. 42; Martínez-Alemán, 2015). This methodology is also in line with the argumentative turn in policy analysis as discussed by Fischer and Gottweis (2012).

## 1.5.    Relevance of the research

With this study, I respond to the call of critical scholars to demystify the construction of a social phenomenon to reveal the beliefs, assumptions, and ideas that such a construction disguises. Philippine Higher Education is well researched albeit this remains within the human capital framework (for example Orbeta, Jr., 2002; Santiago, 2005; Symaco, 2012; Killingley & Ilieva, 2015). An initial literature review on the internationalization of higher education in the Philippines revealed few local institutions which are actively engaged in the topic and invoke the term in a manner that signals the murkiness of internationalization as an educational project (cf. Valdez & Steel, 2013; Balagtas, Papango, Reyes, Ubiña & Atweh, 2012; Dotong & Laguador, 2015; Rosaroso, Dakay & Sarmiento, 2015). This dissertation therefore contributes to the scientific and academic discussion by offering one of the first systematic analyses of the country's IHE policies, while at the same time addressing the research gap on discursive practices in internationalization of higher education in the country. This research project also responds to the need for integrating broader political perspectives into the study of internationalization of higher education and its corroborating policy. For example, Pusser (2015) problematizes the disconnect between higher education research and the use of political theory as a lens, noting that:

> Treating universities as political institutions and sites of the exercise of power has not been the historically dominant approach, as education in general and higher education institutions in particular have been traditionally studied using models of public administration and institutional theory rather than inherently political ones (p. 62).

Pusser (2015) thus argues for conceptualizing higher education as political institutions of the State and for addressing the role of colleges and universities as such. As Ordorika and Lloyd affirm (2015), contemporary higher education research is void of political perspectives despite the historical evidence of higher education institutions as sites of political struggles. Quoting Ordorika Sacristán, and López González (2007), Ordorika and Lloyd note that "the denial of politics is essential discourse for the exercise of power and the legitimation of dominant groups, as well as a basic element of the political nature of the university" (2015, p. 133). On a similar note, Hajer (1993) states that, in policy terms, inaction is a conscious exercise of power by key policy actors (p. 43). The politicized nature of higher education institutions becomes more visible when one focuses on the fundamental transformations that impinge on them which emerge with the dynamics of globalization and, in this research, of internationalization (Ordorika & Llyod, 2015, p. 131). This is especially true in regard to the role that higher education institutions play in national development and in the competition in the global knowledge economy, as well as in the continuing tension between the public and the private

purposes of higher education. This research is also innovative because of its use of the DHA stream of CDS in analyzing the empirical data. Although DHA has established itself in the social sciences, especially in the fields of discrimination and migration politics, its application in the field of education policy studies is still relatively new. According to Lester, Lochmiller and Gabriel (2017), there is an emerging third generation in the field of policy research that employs the perspectives offered by discourse analysis in examining the processes and strategies of codifying and institutionalizing education policies. This research thus contributes to this third generation of education policy, offering an alternative space for empirical studies of internationalization of higher education.

## 1.6.    Structure of the paper

In Chapter 1, I introduce the topic, define the scope of the research, and enumerate the research questions. I also outline the broader context, purposes, and relevance of my research.

In Chapter 2, I present the conceptual framework of the phenomenona of globalization, internationalization, higher education, and education policy that serves as my frame of reference in this study. I offer a differentiated discussion of the dominant concepts such as globalization, neoliberalism, higher education, massification of higher education, IHE, and policy found in the literature to clarify the obscurities and linkages in the definitions. I also recognize that my discussion captures the complexities of these concepts from a specific point of view, thus it needs to be understood as one possible frame for interpretation, alongside many others.

In Chapter 3, I provide a background to the Philippine context. This Chapter is crucial for gaining a deeper understanding of how the country's colonial history and the wider historico-political conjunctures have forged a distinct valuation, concept, and structure of the education system. Furthermore, this chapter helps put the country's responses to, and geo-political positioning in, the global discourse on internationalization into perspective.

In Chapter 4, I deliberate on my methodological framework. In particular, I clarify the research strategy and design, and provide my arguments for choosing the qualitative approach. In this chapter, I operationalize the research questions and delineate the analytical tools that I employ in addressing the research questions. I also discuss the methods I utilized for data collection and analysis, the problems and issues that came up throughout the research process, and the actions I took to overcome them.

In Chapter 5, I present the key findings of my research. In this Chapter, I specifically examine the four major discourse strands that structure the policy discourse on IHE at a macro-level, and the various topoi used to justify the policy claims in relation to the country's socio-historical contexts. The conceptual definitions of the discourse strands and how the discourse strands relate to each other are embedded in my analyses.

In Chapter 6, I render the summary and conclusion of my research. In this Chapter, I revisit my research questions, as well as my goals and aims.

## 2. Conceptual framework

Maxwell (2013) defines conceptual framework as "the system of concepts, assumptions, expectations, beliefs, and theories that supports and informs" the research being carried-out. It graphically or narratively explains the key research concepts, variables, or factors and the assumed relationship between them (p. 39). The concepts discussed in this chapter are constitutive of internationalization of higher education. They are crucial elements in making sense of the phenomenon at the macro, meso, and micro levels. Formalizing terminologies requires demarcating knowledge and information. In this section, I discuss definitions not only in terms of their meaning, but more importantly, in terms of their significance within academic practices (Bacchi, 2000, p. 46).

### 2.1. Globalization

Globalization is a fuzzy and porous concept, ubiquitous across the academic fields, particularly in internationalization of higher education and higher education policy. It is the rock unto which many scholars anchor their studies. In other words, it provides the backdrop against which analyses occur. I, as a researcher, do this as well in this project. However, I follow Mignolo (2002), Robertson (2006), Rizvi (2009), Andreotti (2011), Bond and Tikly (2013), Forster (2016), and other critical scholars who call for exposing the biased and politicized nature of the concept. The process of demystification to reveal processes and ideologies that underpin the concept of globalization is thus pivotal in this research. I also argue that globalization and internationalization are two distinct, but overlapping ideas, which stand in symbiotic relationship to one another. A closer examination of globalization and the ways it is invoked in the literature provides a bird's-eye view, a panorama, that will help in making sense of the currents that traverse the notion of internationalization of higher education.

Globalization is understood to be both a phenomenon and a process: a set of "geo-politico-cultural-economic realities" that elicit a set of converging and diverging responses (Kho, 2007, p. 179; Carnoy, 2000; Mundy, Green, Lingard & Verger, 2016). It is multi-pronged and dynamic, driven by the integration and reorganization of the world's economies, innovations in information technologies, and the formation of new knowledge networks (Altbach, Reisberg & Rumbley, 2009; Carnoy & Rhoten, 2002; Koh, 2010). It encompasses a wide range of distinct political, economic, social, and cultural trends; it signals fundamental shifts in the contours of human lives that materialize in various ways (Scheuerman, 2010; Rizvi & Lingard, 2010). The term has also become synonymous to various terminologies that describe aspects of the phenomenon, such as: global village, global integration, flexible accumulation, transnational companies, global connectivity, complex interconnectivity, global cities, free trade, economic liberalization, internet revolution, or Westernization (Scheuerman, 2010; Marshall, 2014). It also refers to the "compression of time and space" through technology, as well as

"cosmopolitanism" as a new form of "global consciousness" (Turner, 2010, p. 5). Altbach et al. (2009) argue that globalization is "a key reality in the 21st century" which is profoundly affecting education systems worldwide (p. 7). As a phenomenon, globalization is contested terrain, owing to its complicated nature, its scope and scale, and its unequal effects on different social groups (Griva & Chryssochoou, 2015; Torres, 2015). Proponents and critics of globalization theories caution on cursory claims on what globalization is and its relation to education in general, and to higher education in particular (Witt, 2011).

### 2.1.1. Descriptive and normative dimensions

Rizvi and Lingard (2010) suggest that the concept of globalization can be understood in three basic ways: as an empirical fact, as an ideology, and as a social imaginary. These descriptions provide a succinct overview of the discourse and underline the descriptive and normative nature of globalization.

### 2.1.1.1. Globalization as an empirical fact

Globalization is empirical in the sense that it refers to the actual, lived experiences of people as a result of the fundamental changes mainly caused by technological advances that are taking place across the globe. From this standpoint, speed, space, and simultaneity become the core principles. As distance is measured in time, spatial location has become less relevant. Human activities have become compressed in both temporal and geographical sense (Mundy, Green, Lingard & Verger, 2016; Stromquist & Monkman, 2000). A basic illustration of this fundamental shift is in transportation as travelling has become faster and less expensive. Thus, globalization is also characterized by mobility. The mass movement of people, goods, capital, and ideas has produced connectivity and interdependence in many ways. Technological developments in media and communication also illustrate how speed and space have 'annihilated' notions of geographical location and time. Individuals have become more mobile, societies more connected, and nations interconnected, which means that fundamental changes are taking place in the pace and structures of the social life.

### 2.1.1.2. Globalization as ideology

An ideology is a system of norms, values, beliefs, principles, or ideas widely-shared and accepted as truth by a group of people. It is:

> […] the prime means of manufacturing consent […] by transforming the ideas of dominant groups into so-called 'natural' laws or 'natural' ways of social practice. This gives the ideas their sense of public authority and objectivity [….] It functions as the

natural reality of everyday life, as a body of 'common sense' taken up by individuals to organise the mundane world into a coherent and meaningful entity' (Lim, 2012, p. 62).

According to Rizvi and Lingard (2010), globalization as an ideology represents a certain value orientation marked by power relations and political interests. As an ideology, it prescribes new forms of political-economic governance based on neoliberal ideas such as privatization of state functions and minimal state intervention (for example, free trade, economic liberalization) in the provision of goods and services such as healthcare and education (p. 31; see also Carnoy, 2000). As an ideology, it has a "discursive superstructure," a "social representation," or "a network of socially constructed attitudes, values, and beliefs" built around a set of (policy) ideas, from a specific ideological position of a period that guides political behavior (Griva & Chryssochoou, 2015, p. 880; Rizvi & Lingard, 2010, p. 37). Rizvi and Lingard (2010) further argue that the neoliberal ideologies of globalization and its corroborating imaginaries emerged from the context of global interconnectivity and flows of ideas across national spaces (p. 37). Competition-based reforms at all levels of the education system both in national and international contexts, such as standard testing to measure learners' and teachers' performance through PISA, are ideals that support neoliberal policies in education (Mundy, Green, Lingard & Verger, 2016; Torres, 2015). The dominance of these ideas conceals their normative assumptions, thus creating a juggernaut that has become inevitable and ubiquitous. "But arguably neoliberalism is but one way of interpreting globalization, designed to steer formation of the subjective or phenomenological awareness of people" (Rizvi & Lingard, 2010, p. 32). Hence, neoliberalism encourages a specific way of interpreting what globalization is, and this interpretation "presupposes a set of values attached to it" requiring certain types of responses or set of behaviors (Rizvi & Lingard, 2010, p. 32). The ideology of globalization is marked by shifts in political and economic structures, as well as shifts in social and cultural values.

### 2.1.1.3.    Globalization as a social imaginary

In *Imagined Communities*, Anderson (2006) explains how communities and nations are imagined and self-evident in revolutionary and anti-colonialist literature. Providing literary samples from postcolonial countries such as the Philippines and Indonesia, Anderson traces the cultural roots of the sense of community or nation through shared lived experiences of the people which evolved from sacred to secular. According to Taylor (2004), social imaginary is an ideology or set of ideologies that have been internalized by a society through social practices. Similarly, Rizvi and Lingard (2010, p. 35) note that a social imaginary involves a social collective force that is not bound to time and space; it is understood in multiple ways and is thus higly contested within and across communities. A collective sense of imagination

creates a society and gives that society coherence and identity. At the same time, through the shifts in the social imaginary, a society is subject to both mundane and radical changes (Rizvi & Lingard, 2010, p. 35). Once an ideology or set of ideologies have crystalized in the community life, they will guide the community members' behavior and become the basis of their decisions. In other words, social imaginary provides sense and legitimacy to a way of thinking or common understanding shared by ordinary people. Since social imaginary is in a constant state of flux, peoples' sense of identities and perception of the possibilities available to them are also constantly changing. How a society understands and experiences globalization depends on the group's unique history and political configurations. As Rizvi and Lingard (2010) put it:

> The globalized world is fundamentally heterogeneous, unequal and conflictive [….] It is experienced differently by different communities, and even individuals. It is sustained and created by people and institutions, and is thus always expressed in vernacular ways, reflecting the different cultures, histories and politics of different nations (p. 24).

67Thus, the local contexts and the role of nation-states in formulating and effecting their responses remain relevant (see also Gopinathan & Altbach, 2005, p. 119; Tikly, 2004). A social imaginary is not only limited to the ideological nor the material. It defines and delimits what is legitimate, what could be known, thought of, or acted upon. Hence it links the present to future aspirations at the collective level (Stein, 2017, p. 29). It shapes not only what can be imagined about education, but also the discourses of education (Rizvi & Lingard, 2010, p. 23). This implies the crucial role that agency plays in negotiating the process and effects of globalization. In this sense, social imaginary expresses human agency and understanding of the 'self' in relation to the 'others,' as illustrated in discourses, for example, on diaspora or xenophobia. Shifts, or changes in the social imaginary of a group do not only refer to the social processes, but also to the perception of social identities and the social and physical spaces that individuals occupy.

### 2.1.2. Globalization as a problem-space

Collier and Ong (2005, p. 12) conceptualize globalization as an 'assemblage' which "is the product of multiple determinations that are not reducible to a single logic." Borrowing from Deleuze, the authors argue that the calculated, specific responses to globalization as a 'problem-space' are "minor histories that address themselves to the 'big' questions of globalizations in a careful and limited manner" (p. 15). This spatial understanding of globalization is also characterized by its affective dimensions, depending on how the narratives of and about globalization are publicly discussed (Koh, 2010, p. 16). The notion of globalization

could thus be understood as a "problem-space" in which a plethora of 'problems', 'issues', 'challenges', 'opportunities', or 'risks' need to be resolved at the level of the nation-state and supra-national authorities (Koh, 2010, p. 15). This implies a strengthening of the role of nation-states through mobilization of their power and authority and social experimentations to discipline and mould their subjects for the 'global economy' (Koh, 2010, pp. 15-16). As Scholte (2005, p. 3;) emphasizes, globalization as a form of spatial transformation is "thoroughly and inescapably political" which is capable of significantly empowering or disempowering specific entities.

### 2.1.3. Education and globalization

In relation to education, Spring (2009) describes globalization of education as a flux of global events and discourses that impact national schools and educational policies, and the dynamics that result through these interactions (p. 1). The discourse that occurs in international spheres through international organizations creates an image of a superstructure over the nation-state, and its effects are felt on the local level by way of influence on policies and practices. This image has led some theorists to argue in the mid-1990s that globalization will lead to the demise of the nation-states. Carnoy & Rhoten (2002), however, assert that these arguments were based on insufficient historical accounts of how nation-states have always managed large social forces and on the researcher's inability to separate material/objective reality from ideology (Roberts, 2015).

> A major problem in jumping on the end-of-the-nation-state bandwagon is to separate objective reality (e.g., increased global financial flows, increased global trade within and between multinational companies [MNCs], declining public employment) from an ideological position pushed by these same financial interests, MNCs, the United States, and international organizations seeking to increase their power on the basis of a global economic order (Carnoy & Rhoten, 2002, p. 4).

In 2002, Carnoy and Rhoten proposed that "at the heart of the relationship between globalization and education in the current historical conjuncture is the relationship between the globalized political economy and the nation-state" (p. 3). The authors argued that, indeed, globalization processes, especially the economic dimensions, are shifting the nature of the role of nation-states in education delivery. Globalization processes present new empirical challenges and at the same time lend themselves to new conceptual and methodological frameworks in studying education and education reforms. As Lingard (1996, p. 67) argues, the postmodernist state remains relevant despite the new forms it has taken, its different methods of operation, and shifting priorities in policy outcomes. Thus, globalization in education involves

actors, organizations, institutions, and activities at varying scales and it influences the policy-making process, from agenda-setting to implementation (Rizvi & Lingard, 2010). However, the relationship between globalization and education is symbiotic and multidirectional. To assess the impact of globalization on educational change, it is imperative to examine how "globalization and its ideological packaging affect the overall delivery of schooling;" how transnational paradigms are adopted and adapted at the regional, national, and local levels; the *implication of the translation processes* to national policies and local practices; and globalization's impact on cultural ideologies, institutional structures, and individual practices within and between countries (Carnoy & Rhoten, 2002, pp. 2-9; my emphasis).

According to Lingard (2009, p. 18), globalization, as it has developed in the last thirty years, is underpinned by neoliberal social imaginaries which shifted the focus from concerns over collective welfare and well-being, to prioritization of market (economic) principles and 'self-capitalizing'. Under this condition, the central purpose of education and schooling has become closely linked to economic goals (cf. Ball 1998, 2012; Lingard 2009). Referring to schooling, Lingard (2009) further asserts that human capital rationale has provided the framework for a meta-policy in education at a global scale with repercussions for individuals, especially in terms of pedagogical practices and schooling outcomes. As Lingard (2009) explains:

> Schooling, and more broadly education, are seen to have as their central purposes the production of the requisite quantity and quality of human capital within a given nation. That human capital is in turn regarded as necessary to ensuring the international competitiveness of the national economy (the boundaries of which, of course, are melting into a global economy). Policy in education thus has been economised" (p. 15).

Ball (2012) warns that the unbridled use of the term 'neoliberalism' could render the concept meaningless, and therefore argues for a more differentiated application. Accordingly, Ball views neoliberalism as a multi-dimensional, complex, incoherent, or even contradictory set of practices based around a particular imaginary about the market which permeate social relationships. In simplified terms, neoliberalism is about "money and minds" (2012, p. 3). In light of the financial crisis that started in 2008 triggering retrospective realizations of the failures of the free market fundamentalism, a 'post-neoliberal' regime as a new economic paradigm seems to have surfaced (cf. Rudd 2009; Evans 2018). However, social policy, and, in effect, education policy, remain trapped in the neoliberal imaginaries (Lingard 2009). This is particularly true in higher education. The liberalization of higher education as a type of service under the General Agreement on Trade in Services (GATS) illustrates how neoliberal principles have permeated and changed the very nature of higher education. GATS is a legally

enforceable set of multilateral rules that, for the first time, covers the services sector at the international level (Knight, 2002). GATS is under the auspices of the World Trade Organization (WTO) and WTO's 144 member countries signed it in 1995. The fundamental objective of GATS is to remove barriers to trade in services — including higher education — which are usually in the form of domestic regulations. GATS, as a mechanism, supports the progressive objective of WTO to achieve intensified levels of liberalization (Patterson, 2005, p. 358). It covers the following modes (Knight, 2002):

a) Consumption abroad of services by consumers travelling to a supplier country (i.e. study abroad or student mobility);
b) Cross border supply of a service to a consumer country without the supplier being present in the consumer country (i.e. distance education);
c) Commercial presence of a supplier in consumer country (i.e. satellite campuses, offshore universities); and
d) Presence of Natural Persons from a supplying country in a consuming country (i.e. academic and staff mobility).

Although countries have reacted differently to GATS, its policy implications and impacts are evident in the current internationalization discourse where one commonly finds the terms 'competitiveness', 'productivity', or 'employability' in response to the 'global knowledge economy'.

## 2.2. Higher education

Education systems across the globe vary. To facilitate comparability of education statistics and indicators amongst different countries, the UNESCO (United Nations Educational, Scientific and Cultural Organization) developed the ISCED (International Standard Classification of Education) based on internationally agreed upon terminologies (UNESCO Institute for Statistics, 2012). 'Level' refers to a category of educational programs based on gradation of the complexity of knowledge, skills, and competencies that the learners are designed to acquire. In ISCED's terms, higher education also refers to tertiary education levels. The tertiary level is variegated and diverse, spanning programs at ISCED levels 5 (short-cycle tertiary education), 6 (Bachelor's or equivalent level), 7 (Master's or equivalent level), and 8 (Doctoral or equivalent level). These programs can be academic or professional in nature, and can also include those organized in the non-formal sector as a complement to the formal system.

In this dissertation, higher education is understood beyond bureaucratic and legal definitions that refer to accreditation or degrees awarded. Without discounting other ways and forms of

learning, higher education also entails a normative claim of a functional nature; as a medium or a vehicle for developing more complex, advanced, and specialized knowledge and competencies that promote analytical and critical thinking (Owens, 2001). For example, and in relation to the noneconomic benefits of higher education, Oketch, McCowan, and Schendel (2014) note that in the context of developing countries, participation in higher education has positive impacts both on individual capabilities and on strengthening of social institutions (p. 7). Encapsulated in the concept of higher education is the university as an institution of higher learning. Castells (1993) delineates the roles and functions of universities in a society as follows:

- Universities are ideological apparatuses, that is, they generate and disseminate ideologies and values in collaboration or competition with other state institutions. Castells emphasize the plurality of ideologies and how they are expressed in societal struggles (1993, p. 71).
- Universities cultivate elites and ensure that new elites are formed. Thus, they serve as a mechanism to establish and sustain social stratification;
- Universities produce and reproduce, apply, and distribute new knowledge;
- Universities train the labor force and bureaucracies (pp. 70-75).

According to Castells (1993), these roles and functions change over time and are not always congruent. Hence, universities are "dynamic systems of contradictory functions" and are in a constant struggle to define themselves and their purposes (Denman, 2005, p. 10; Castells, 1993, p. 70). In his expositions in *What are universities for*, Collini (2012) argues for a more differentiated conceptualization of the university compared to other types of higher education institutions than suggested above. Defining the characteristics of the university does not mean to disparage other types of higher education institutions; however, the amalgam of responsibilities entrusted to contemporary universities call for a reflection on what they are for. Collini (2012, p. 7) describes the four basic characteristics of a university as follows:

- They provide education at the post-secondary level that goes beyond professional training.
- They promote and conduct some form of advanced scholarly activities that are both basic or fundamental as well as applied in nature.
- They pursue research that is not confined to a single discipline or a tight cluster of disciplines.
- They exercise, as an institution, some form of intellectual freedom and autonomy.

Apart from these four characteristics, it is necessary for universities, and intrinsic to their nature, to train and mold (their) future scholars who can pursue "open-ended research for

deeper understanding" that also requires autonomy on the part of the scholars, especially from their donors (p. 8). Thus, universities perpetuate the creation of communities of productive scholars and learners (Denman, 2005, p. 10). In congruence with Castells, these characteristics, no matter how minimal, do suggest the problems intrinsic to the role of the universities in the society because "It seems as though they are bound, by their nature, to be constantly going beyond whatever particular menu of tasks society may set for them" (Collini, 2012, p. 7). One of the problems in discussing what universities are lies in the ahistorical approach to how universities have developed. In other words, the values and principles attached to universities are grounded in different historical origins, cultural concepts, and aspirations (Collini, 2012, p. 21). On the other hand, scholarship and science are inherently international activities. Although higher education systems do differ around the world, no system can be examined in isolation. In other words, contemporary universities bear traces of how ideas of higher learning circulated throughout time (p. 24).

The founding of the University of Berlin in Germany in 1810 by then Prussian Minister Wilhelm von Humboldt is conventionally regarded as the symbolic origin of the contemporary university, the "mother of all modern universities" (Humboldt-Universität zu Berlin, n.d., para. 2). Humboldt's ideals of a "Universitas litterarum" combine research and training, intellectual autonomy, and comprehensive or humanist education for its students. This vision diverged from the then existing ecclesiastical universities established from the Middle Ages which mainly trained government and church functionaries as well as children of landed elites (Collini, 2012, p. 23). In the new Humboldtian ideals, research became the defining purpose of the university, not only in natural sciences, but also in other fields such as the humanities and social sciences. The value attached to research created a structure of academic career progression based on scholarly activities: thus, the systematic education of the next generation of scholars through doctoral programs and awarding of higher degrees became ingrained in, and buttressed, the university's purpose of providing 'higher learning'. This Humboldtian university set the standard and became the benchmark in Western societies. Over time, this model underwent transformations within the context of the social environment in which universities operated.

As in other social institutions, a university does not exist in a vacuum: it is rooted in specific cultural contexts and intellectual traditions. Its relation to its respective state (or government), particularly in regard to funding and support, depends on local circumstances. Publicly funded universities, such as in Europe for example, can be understood as "direct instruments of government policy" that support, for instance, forms of assimilation or inculcation of social values (Collini, 2012). Hence, universities in general, and public universities in particular, are

politically located and constituted institutions of the State (Pusser, 2015, p. 62; Ordorika & Llyod, 2015, p. 130).

Paradoxically, the Humboldtian model also embodied the tensions that many modern universities face: autonomy (Lehrfreiheit) versus state control, "a cross between a self-governing community of scholars and a collection of civil servants," the tension between serving a variety of societal needs and withdrawal from, or even resistance to, dominant societal values and practices (Collini, 2012, p. 25; Ordorika & Llyod, 2015, p. 130). However, as Denman (2005) argues, the concept of "higher" in higher education is contested and raises further questions related to "academic excellence" (p. 17). Also, the massification of higher education provides an impetus for alternative university models that further variegate the rationales of universities and blur the distinction between universities and other higher education institutions. Denman (2005) further remarks that this fuzziness can be understood as positive to underline the specific circumstances of the institution, such as the target group or audience it serves, its territorial jurisdiction, and the discipline-specific and/or other types of research it conducts (p. 17). From a governance perspective, Arnove (2003) contends that universities are, and have been, utilized to control social, political, and economic power relations. This purview redefines higher education as a political institution of the State; a space or sphere entrenched in contest and conflict. This claim further suggests that the "university's control over knowledge distribution has become the new hegemonic struggle of the 21st century" (Denman, 2005, p. 17). Similarly, Ordorika and Lloyd argue: "As such, (universities) serve as a staging ground for conflicting societal demands, ranging from capitalist accumulation and the reproduction of existing class structures on the one hand to upward mobility and social equality on the other (2015, p. 130). Also, Altbach (2004) argues that "much of the non-Western world had European university models imposed on them by colonial masters" (p. 4). Academic colonialism through the conquest of colonial subjects in Asia, Africa, and South America consigned the existing indigenous learning systems to the past and devalued the body of knowledge associated with them (Stein, 2017). In view of these debates, Denman (2005) proposes a practical definition of a university in the 21st century:

> A university is a complex higher education organisation that is formally authorised to offer and confer advanced degrees in three or more academic disciplines or fields of study (p. 19).

Any definition indicates assumptions about the concept and its connotations. In this definition, Denman intentionally omits research since research activities take place in different forms and at various degrees of scope. Nevertheless, research and scholarship are embedded in his term

'advanced degree' which also acknowledges the role of universities in knowledge (re)production (Denman, 2005, p. 19).

### 2.2.1. Massification of higher education

The boom in higher education in the last decades has been remarkable. Calderon (2018) estimates that there will be 594 million students enrolled in higher education institutions worldwide by the year 2040, as compared to only 38.6 million in 1970. This huge leap in numbers generally indicates the growing relevance of higher education in many societies. Indeed, the recent demand for higher education illustrates how emerging economies are expanding exponentially due to demographic and economic shifts (Maslen, 2012; Marginson, 2016; Ratanawijitrasin, 2015). "Massification is without question the most ubiquitous global influence of the past half century or more" (Altbach, 2013, p. 8). Increasing population and public demand for access to higher learning were the initial drivers of massification. Marginson (2016) argues that it is the ambition of individuals for social position and self-actualization that powers the ongoing dynamism in higher education.

> Thus, universal desires for social betterment are articulated through higher education systems that are themselves becoming universal. But the opportunities that education is meant to bring are *not* universal, not in capitalist societies that, regardless of whether they are low-, middle- or high-income, are stratified by unequal earnings and hierarchical position […] (p. 415).

Marginson (2016) further purports that, at any given time, a society can only offer a limited number of advantageous positions, and that the attainment of these positions largely depends on the relative location of the individual within the social hierarchy. Thus, individuals and families are contending from unequal starting points, and they take pathways with outcomes that may or may not correspond to their expectations. Populations, labor markets, higher education systems, and education outcomes are stratified. Inclusive educational policies are meant to modify the extent of these stratifications and, for this purpose, the design of higher education participation matters (p. 421). This perspective stresses three important factors: the agency of individuals, the role of higher education in social allocation, and the existing social structures in which higher education systems operate and individuals need to work around.

There seems to be agreement regarding the positive relationship between higher education and development, despite the problems that this connection presents (cf. Austin & Jones, 2016; Gough & Scott, 2007; Marginson, 2016; McGrath, 2010; Schofer & Meyer, 2006). Against this backdrop, governments around the globe are expanding their higher education systems,

although the pace, scale, and scope of expansion differ. The concepts of globalization and knowledge economy, the ensuing market competition in its various forms (i.e. ranking, innovation, global race for the best talent, etc.), and the perceived return on investment in human capital drive the need for expansion and 'modernization' on a global scale (cf. Altbach et al., 2009; Altbach, 2013; British Council, 2013). Austin and Jones (2016, p. 3) contend that transnational institutions such as the Organisation for Economic Co-operation and Development (OECD), the World Bank (WB), and the WTO promote neoliberal "philosophical prescriptions of globalization and the new economy" that position higher education as a motor of national development through the production of knowledge (also Marginson, 2016; Jiang, 2008). These prescriptions have gained currency amongst governments and institutions worldwide and are behind the massification of higher education.

Massification also has additional implications. First, it provides access to groups who were formerly excluded by the traditional university systems (i.e. women, minority ethnic groups; adult learners). Second, it compels higher education systems to diversify funding patterns and sources due to financial pressures on governments as providers of education services. The opening of the sector to private organizations propelled the spread of private institutions and encouraged enterprise-like approaches to management. Third, and in relation to funding issues, is the commodification of education services. From this standpoint, individuals are regarded as consumers, and education services as consumer goods. Both privatization and commodification are entrenched in neoliberal economic policies. Mass access to higher education also brought about the differentiation of higher education institutions, not only in regard to funding sources and patterns, but also in regard to institutional missions and rationales. Related to differentiation is the issue of quality in terms of student body, academic staff, and student/learning outcomes, amongst others. The range of quality in various respects, consequently necessitated the establishment of quality assurance systems, recognition frameworks, and accreditation agencies (Altbach, 2013, pp. 8-9; Knight, 2008, pp. 4-7).

### 2.2.2. Internationalization of higher education

Knight (2008, p. 21) provides the most commonly accepted definition of internationalization: "Internationalization at the national/sector/institutional levels is the process of integrating an international, intercultural or global dimension into the purpose, functions or delivery of higher education […]" Knight intentionally provides a 'neutral' definition to emphasize the universal nature of the phenomenon, its orientation to process, the varying purposes and outcomes it serves, and the plurality of the stakeholders it involves. It thus reflects the need to have a more generic understanding of the concept applicable to the different contexts in which it occurs (2008, pp. 20-21). This definition also recognizes the role of nation-states in steering and

controlling of higher education systems. Knight (2008) further argues that internationalization is a means to increase quality and relevance of higher education as societies become more interconnected and interdependent. Inherent in this argument is the ubiquitous effect of globalization on social, cultural, political and economic systems. Although internationalization and globalization are sometimes discussed interchangeably, it is necessary to differentiate one from the other. Kehm and de Wit (2005) propose looking at these two as overlapping dimensions, and not as individual parameters sitting at the extreme sides of a spectrum. Furthermore, according to Egron-Polak (2012; see also Knight 2008), internationalization values have shifted from:

- capacity-building cooperation to alliances designed to win competitions;
- providing access to international students in programmes not available to them locally to the race for the world's 'best brains';
- partnerships for solidarity to strategic partnerships for economic and geopolitical goals;
- pursuit of soft diplomacy to economic competitiveness:
- cultural understanding and diversity in worldviews to alliances for prestige, status, and 'global' rankings.

This evolutionary process, however, did not occur in a linear fashion. In many instances, its components largely depended on the preferences and strategic goals pursued by the various stakeholders. Since the 1990s, there have been distinct but overlapping international dimensions that have been transforming the higher education sector. These dimensions are summarised here as the 5 P's (cf. Knight, 2008):

- Partnership – such as the development of international networks, consortia, franchises, offshore satellite campuses, mobility or study exchange agreements, inter-institutional schemes such as joint / double / dual degree, research alliances, and clusters;
- Programme – emphasis on the international dimensions of qualifications, curricula, learning processes, outcomes, and content, such as global and intercultural competencies, inclusion of global themes (i.e. global learning), promotion of collaborative (transnational) research, use of international and comparative approaches, development of cross-border programmes, conduct of 'internationalization-at-home' activities or campus-based formal and informal activities with international and multicultural components;
- Process – the backbone of internationalization activities of the institution, particularly in curriculum design, teaching and learning activities, the establishment of international/global offices which implement internationalization strategies within the institution, and in the recruitment of foreign students, faculty, and staff;

- Policies – development of institutional strategies, articulated, for example, in an institution's vision and mission, that promote and facilitate the internationalization activities described above and the establishment of national, regional, and interregional policy frameworks that guide institutional strategies and support internationalization initiatives;

- People – increasing number of students, staff, academics, and researchers participating in the above activities, the scope and flow of student mobility which impact policy frameworks (i.e. who goes where, when and why), increasing number of professional for-profit and non-profit organisations focused on international education (i.e. National Association of Foreign Study Advisers or NAFSA, the European Association for International Education or EAIE, the Asia-Pacific Association for International Education or APAEI, to name a few), and the current trend of international advisory councils which govern academic internationalization of 'world-class' universities (cf. Mihut, Altbach & Salmi, 2016).

The proliferation of technology in programme delivery such as MOOCs (massive online open courses), massification, privatization, and commercialization of education or, in other words, the increasing demands for the 'consumption' of education as a 'product', also impacts the scope and complexity of the international dimensions of higher education (cf. Knight, 2008, p. 3). The issues raised here demonstrate that internationalization of higher education is a dynamic process and the context in which higher education operates is also rapidly changing. Globalization and its elements are the most pervasive, while regionalization, although closely linked to globalization, is increasingly playing a pivotal role in the further evolution of internationalization and in the shifting agendas in higher education (pp. 5-7).

Owing to the current developments in global and international higher education, many scholars are arguing for "serious reflection and debate" (Knight, 2013, p. 89) on the nature of their relationships, the directions they take, the values they promote, the epistemological lenses used in examining the phenomenon, and their implications for education policies and practices (Crossley & Tikly, 2004; Matthews, 2002; Tikly, 2009; Rizvi, 2009). Conceptualization of internationalization in higher education has indeed evolved in the last decades, and continues to do so[2]; its definitions have varied along with the shift in policies. Thus, internationalization has become an agent of change, both as it manifests itself in policy initiatives and as a set of practices and processes (Egron-Polak, 2014). It is transforming the higher education landscape and, at the same time, it is in a constant state of flux due to the influences of globalization and regionalization (Knight, 2008). Maringe and Woodfield (2013), as well as de Wit (2016) suggest rethinking not only the definition, but also the scope and scale of research

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[2] For example, Hudzik (2011) suggested the concept of Comprehensive Internationalization (CI), while Rumbley (2015) advocated Intelligent Internationationalization. Both concepts are based on the US context.

in the field of internationalization and the different spaces that it creates considering the varied perspectives that accentuate institutional rationales and motives for pursuing internationalization. The authors call for broadening and redefining the current internationalization paradigm, particularly in regard to the ways it relates to the mission and activities of higher education institutions (pp. 1-3).

The call to rethink internationalization has set in motion some international initiatives. The *Affirming Academic Values in Internationalisation of Higher Education: A Call for Action*, published by the International Association of Universities (IAU) in 2012 aims to mitigate the adverse consequences of internationalization and to ensure positive reciprocal benefits to all stakeholders involved (IUA, 2012). In the same year, the European Association for International Education (EAIE) published the *International Student Mobility Charter,* which calls on various stakeholders, such as government and education institutions, associations of international education, as well as other international agencies, to safeguard the rights and welfare of international students (EAIE, 2012). In 2014, the International Education Association of South Africa, a sister-organization of EAIE, organized the *Global Dialogue on the Future of International Education* (IEASA, 2014). Based on IUA's Call for Action and EAIE's Charter, participants of the event signed the *Nelson Mandela Bay Global Dialogue Declaration on the Future of Internationalisation of Higher Education* to encourage and endorse a more accessible, accountable, inclusive, collaborative, equitable, and ethical approach to internationalization. In light of these developments, de Wit, Hunter, Howard, and Egron-Polak (2015, p. 28) modified and updated Knight's definition of internationalization:

> […] the **intentional** process of integrating an international, intercultural or global dimension into the purpose, functions and delivery of post-secondary education, **in order to enhance the quality of education and research for all students and staff, and to make a meaningful contribution to society** (emphasis in original).

The authors claim that this definition emphasizes a more inclusive approach to internationalization. A reduced emphasis on mobility and mobile individuals underlines the importance of curriculum and learning outcomes and a commitment to improving quality (and therefore puts less emphasis on the economic rationales of internationalization).

### 2.2.2.1.    Internationalization of higher education as a national policy

Van der Wende (1997) defines the internationalization of higher education in connection to national policies as a "*systematic, sustained effort aimed at making higher education (more) responsive to the requirements and challenges related to the globalization of societies,*

*economy and labour markets"* (p. 19, italics in original). This definition highlights internationalization as higher education's multidimensional and programmatic response to the demands and challenges of globalization in the areas of economics and labor markets, particularly in regard to program content and outcomes for individuals (graduates, staff) and institutions (i.e. partnerships). It also stresses the role of national governments, and in the context of Central and Eastern Europe, the efforts to reform, restructure, or upgrade the higher education sector in the process of transitioning to democratic market economies. Such a scope of internationalization becomes an "important resource in the development of higher education **towards a system that is first of all in line with international standards**. And secondly towards one that is **open and responsive to its global environment**" (pp 19-20; my emphasis). This implies that the process of internationalization is dynamic and embedded in transformations occurring at various scales (p. 20). It must be noted that van der Wende's conceptualization is based on research conducted for and in the European context, at a time when the state of internationalization was drastically changing in the light of the inclusion of the education sector in the GATS in 1995. It thus raises the question of the meaning of international standards and its implications to developing or emerging economies, which have just begun to slowly play catch up in terms of internationalization of higher education.

There are varied rationales for the internationalization of higher education. Rationales drive countries, institutions, and sectors to invest in and engage in internationalization activities, based on expected outcomes or benefits (Knight, 2008, p. 25). These rationales are broadly placed into four categories (see Figure 1). Political rationales refer to priorities in foreign policies, issues of national security, or the promotion of cultural (or regional) identity. Economic rationales emphasize competitiveness on the global labor market, economic growth, and other financial incentives drawn, for example, from trade in education. It could also be understood in terms of economic investments for the economy, such as in human capital development or in research and innovation. The social/cultural rationales focus on ideas of global citizenship as well as national citizenship, interculturalism, and social and community development. Academic rationales underline the international dimensions of research and teaching, institution or capacity building, quality improvement, building institutional profile and status (i.e. rankings), setting or achieving international standards, and the development of individuals.

Figure 1:  Conceptual framework for internationalization at the level of national policy
Based on van der Wende (1997, p. 36) and Knight (2008, p. 25).

**Political**

**Educational / Academic** ———————— **Economic**

**Social / Cultural**
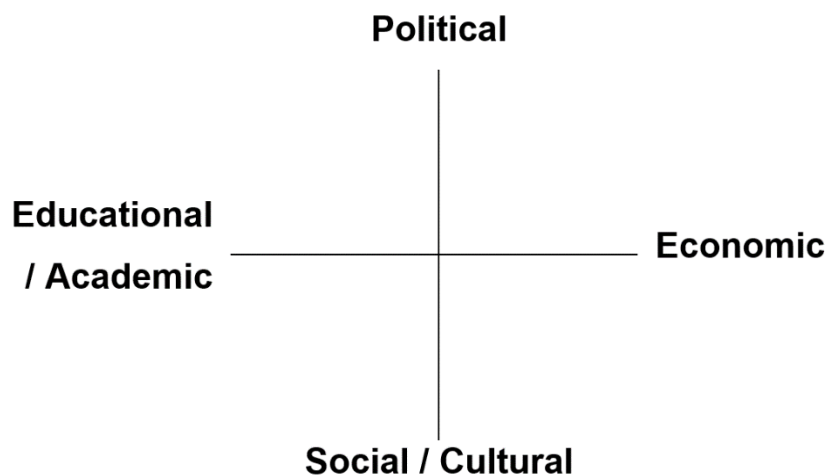
The above model needs to be interpreted as four separate lines, each with a minimum and a maximum weight. The minimum weight is in the middle where the points converge, while the maximum weight is located at the ends of the lines which extend to the exterior of the model (van der Wende, 1997, p. 36). In practice, national policies on internationalization will be a combination of the four rationales; and depending on the internal and external contexts, these rationales can change over time. Knight (2008, p. 25) also stresses that, as ideas about internationalization diffuse, the boundaries between the rationales become blurred. For instance, the idea of human capital development in internationalization policies embraces all four rationales. It is therefore necessary to first clarify the rationales for internationalization prior to defining any international strategies or activities. As de Wit (2016) argues:

> But how can clear objectives and goals be defined, and how can the intercultural and international learning outcomes be defined and assessed, without first having described the specific (inter)national, institutional and/or programmatic context and, based on that context, the relevance of the internationalisation strategy? (p. 18).

Although de Wit's observation focuses on individual institutions, his ideas can also be applied to governing bodies responsible for framing the internationalization strategies at the national level. This is particularly the case as he calls for a serious reflection on the purposes of internationalization, or what drives higher education systems to engage in internationalization, at both the policy and practice levels. "Whenever there is discussion of a vision for internationalisation, the question 'Why?' should be at the heart of it […]" (de Wit, 2016, p. 18). Unfortunately, this kind of reflection and rethinking remains unattended, or at the very best, it is dealt with superficially and marginally (de Wit, 2016, p. 18).

In a qualitative policy research study commissioned by The British Council, Ilieva, and Peak (2016) identify the areas of International Higher Education (IHE) supported by 26 governments across the globe. Based on previous research findings also commissioned by The British Council, the authors created an index with 37 indicators which were then grouped into three broader categories: openness and mobility, quality assurance and degree recognition, and access and sustainability. Using these categories, the authors assessed and compared national policy frameworks, drawing their analysis from policy documents and regulatory frameworks. The authors measured the openness of the higher education systems based on qualitative indicators of government-level commitment to internationalization in the form of internationalization strategies and the provision for an enabling policy environment for the inbound and outbound mobility of students, staff, programs, providers, and research activities (p. 5). In relation to the index on openness and mobility, quality assurance and recognition of international qualifications indicate a regulatory environment that supports mobility through quality assurance practices in higher education. This category specifically refers to the admission of international students, inter alia with the provision of academic programs and recognition of overseas qualification. The third category is also related to the first. It refers to policies that deal with equitable access to mobility programs (including provision for funding) and sustainable approaches to mitigate unintended consequences of mobility, such as brain drain and displacement of disadvantaged students. In the study, these three categories contribute equally in terms of weight (0.33 each) (pp. 5-6).

In 2017, Ilieva, Killingley, Tsiligiris, and Peak extended the data to include an additional 12 countries and territories. Although the three broad categories underpinned the new study, the authors regrouped the indicators into thematic areas or fields of activities: international student mobility, transnational education, and international research engagement. According to the authors, this move contributes to an in-depth understanding of the countries' position regarding their engagement in international higher education. While the first set of indicators from the 2016 study illustrate the characteristics and structures of existing national policy and regulatory frameworks, the new indicators in their 2017 study present a very specific focus on the mobility of students, ideas, and institutions. In both instances, however, the rationales for supporting engagement in internationalization activities are not featured, rather they are considered as a given. Although these indicators do capture some essential aspects of national policies in internationalization, there is no space to examine the ideologies and ideas that underpin them.

Using the concept of global community as his analytical lens, Pike (2012) maintains that current developments in international education have shifted the emphasis of rationales and activities in tertiary education from altruistic visions of broadening students' understanding of the

concept of the community to pragmatic individualistic values (read: direct and indirect economic benefits). Although the idea of a global community can be traced back to the global education movement in primary and secondary education in public education systems, it resonates within the tertiary education drawing from earlier traditions in comparative education that support cross-fertilization of ideas and exchanges of individuals for mutual benefit (pp. 134-135). In the face of globalization and the ensuing shift to pragmatic neoliberal values, internationalization has become a "solution on the loose" that claims to satisfy several needs of higher education systems, but in ways that espouse contradicting values (Pike, 2012, p. 144). To say this does not imply undermining the intents and motives of institutions and individuals who engage in international education. The problem arguably is the predominance of economic and individual benefits which do not sit well with the normative aims that a global community fosters. According to Pike, a global community is:

> […] the widening of the circle of compassion or […] the 'global moral community,' a community that derives its meaning and purpose not from the successes and failures of the marketplace but from its capacity to provide opportunities, care and protection for all its citizens" (2012, p. 143).

A global community thus embodies global social justice: it asks uncomfortable questions about inequalities, underdevelopment, human rights abuses, hunger and food insecurity, environmental degradation, marginalization and persecution of groups and individuals, and the continuing destruction of communities in the name of modernization. To do less in international education, Pike asserts, is to perpetuate the illusion of a global community "founded on the idea that the global marketplace should be the principal arbiter of success and failure, of privilege and subjugation, of security and vulnerability." This illusion also elucidates the reality of disconnect, fragmentation and schism in a heightened connectedness of the global age (p. 143). In light of these discussions, Pike offers a matrix to help institutions and individuals map out their internationalization activities against the underlying primary motivations, values, and beliefs that guide the course of internationalization.

The horizontal axis represents a continuum between the two poles of 'Education for Profit' and 'Education for Freedom' following Nussbaum (2009). These poles represent two paradigmatic views about the primacy of education. While education for profit emphasizes the economic benefits for individuals, the other pole, education for freedom, represents the view that the purpose of education is for human development and emancipation. On the other hand, the vertical axis expresses the interests that internationalization activities serve: the self-interest of the student or institutions, or the mutual benefits to be gained by the collective (through

genuine collaborative efforts and/or where the benefits are more distributed). The four quadrants were originally empty in Pike's model. To make the model clearer, I have overlaid the sample activities Pike enumerates into the quadrants (pp. 144-145). For a more nuanced understanding of the matrix, Pike suggests calculating and assigning percentage values of time and resources allocated to each activity and then finding the total percentage for each quadrant. This way, the emphasis on different activities becomes evident. The list of activities in the quadrant are of course not exhaustive and exclusive. Other pursuits and efforts could be added to the list, albeit the exercise requires a degree of reflexivity.

Figure 2: Matrix of IHE activities
Model adapted from Pike (2012, p. 145)

COLLECTIVE

**Quadrant 2**
• Developing joint and double/dual degree programmes with foreign partner institutions
• Offering foreign academic programmes in your institution

**Quadrant 4**
• Strengthening international/intercultural content of curriculum
• International research collaboration
• Internationalization "at home"
• International development and capacity building projects

Education for profit — Education for freedom

**Quadrant 1**
• Marketing/recruiting fee-paying international students
• Provision of programmes /establishment of branch campuses abroad (face-to-face instruction)
• Delivery of distance education courses /online programmes abroad
• Short-term language programmes for international students

**Quadrant 3**
• Outgoing mobility opportunities for students
• International student exchanges
• Outgoing mobility opportunities for faculty /staff
• Hosting international scholars
• Foreign language teaching as part of the curriculum

INDIVIDUAL

Although Pike created the model for institutional purposes, I find it very helpful in thinking through the assumptions, beliefs, and values that motivate nation-states and governments to engage in international higher education. More importantly, it summarizes and augments the

dimensions of international education discussed by van der Wende (1997) and Illieva et al (2017).

### 2.2.2.2. Regionalization and internationalization

In her literature review on internationalization conducted in 1997, van der Wende claimed that the concept is only beginning to grow in importance. Two decades later, Yemeni and Sagie (2016) argued that "internationalisation has become an increasingly important aspect of higher education and moved from the margins of institutional interest to the centre of the academic enterprise" (p. 93; see also Brandenburg & de Wit, 2011; Ergon-Polak, 2014). Indeed, governments and institutions across the globe have embraced internationalization as a policy framework in higher education. In addition, the development of frameworks at the regional level associated with regionalization has intensified the internationalization movement. This trend is more notable in national policies related to quality assurance, qualifications frameworks, academic credit systems, mobility schemes, research and innovation clusters, and other mechanisms aimed at aligning education systems and policies and improving research capacity (Knight, 2013, p. 106). One eminent example of this is the institutionalization of internationalization policies, strategies, and mechanisms within the European Union.

> Over the last 30 years, the European programmes for research and education, in particular the ERASMUS programme but also research programmes like the Marie Curie Fellowships, have been the motor for a broader and more strategic approach to internationalisation in higher education in Europe and have been an example for institutions, nations and regions in other parts of the world (de Wit et al., 2015, p. 27).

Through the Bologna Declaration (1999), the European Union (EU) established the European Higher Education Area (EHEA) to harmonize European higher education (Eur-Lex, 2015). Its mobility program, ERASMUS, marked the EU's strategic approach to internationalization (de Wit et al, 2015, p. 28). In other regions, there are similar initiatives which stress higher education as a key element in regional economic and social integration. These include, for example, the Union of Latin-American and the Caribbean Universities (UDUAL) formed in 1949; the African Union (AU) established in 1963; or the Southeast Asian Ministers of Education Organisation (SEAMEO) founded in 1965, which integrated the Regional Higher Education Development (RIHED) as a regional center in 1993. These associations have established conventions that aim to harmonize their higher education systems.

### 2.2.2.3. New colonization?

The influence of the EU has been remarkable in inter-regional cooperation. Many of these inter-regional cooperation initiatives are co-funded and technically supported by the EU, and use the Bologna Process as a model (Clark, 2014). In Latin America, these include ALFA PUENTES, the ALFA Tuning Latin America Project, ALFA III; ENLANCES, and the Latin America and the Caribbean Area for Higher Education (de Azevedo, 2014). The ALFA projects aim to modernize higher education in Latin America and are in line with the objectives of the EU-Latin American Common Higher Education and Knowledge Area (Beneitone, González & Wagenaar, 2014; Crowfoot, 2020).

In Africa, the initiatives aimed at harmonization and comparability of higher education consist of the African Higher Education Harmonization and Tuning Project, the East African Community, the Conseil Africain et Malgache pour l'Enseignement Superieur – CAMESES, the West African Economic and Monetary Union (EUMOA), the Network of Excellence in Higher Education in West Africa (REESAO), the Licence - Master - Doctora (LMD) system, and the Tunisia-EU Mobility Partnership (Clark, 2014).

In Southeast Asia, the major inter-regional cooperation initiatives comprise the following: the ASEAN International Mobility for Students (AIMS) Program, the ASEAN Credit Transfer System, ASEAN Universities Network (AUN), and the ASEAN Qualifications Reference Framework (AQRF) (Clark, 2014). Furthermore, the EU-funded project, SHARE, which ran from 2015 to 2019, aimed to: "strengthen regional cooperation, enhance the quality, competitiveness and internationalization of ASEAN higher education institutions and students, contributing to an ASEAN Community beyond 2015" (www.share-asean.eu). The Asia-Europe Foundation (ASEF), created through the Asia-Europe Meeting (ASEM) conducted in 1996, also aims to promote "greater mutual understanding between Asia and Europe through intellectual, cultural and people-to-people exchanges" (www.asef.org). One of ASEF's main themes is education and its projects cover several activities from basic education (ASEF Classroom Network) to tertiary education (Model ASEM, ASEF Summer University, Young Leader's Summit) to policy dialogues (ASEM Rectors' Conference and Students' Forum or ARC) (www.asef.org).

As Knight (2013) remarks: "There is no doubt that Europe is a catalyst and model for regionalization initiatives" (p. 109). However, Knight (2013), Jones (2009), and Azpíroz (2015) note that close inter-regional alliances and education reforms promoted by the EU are a subtle demonstration of its soft power agenda. Regarding the EU's interest in Southeast Asia as well as East Asia, Vandewalle (2015) argues that the 21st century political and economic shifts

towards the region provided a new impetus in the interdependence between these regions and the EU. Jones (2009) criticized that the EU's engagement with Southeast Asia is an attempt to re-establish its power and influence in the region through higher education policies and programs via co-optation and internalized agent cooperation.

### 2.2.2.4.          Internationalization of professions

Early in the institutionalization of internationalization of higher education in Europe, van der Wende (1997, p. 27) identified two main rationales behind it: academic and professional requirements of a globalized labor market on the part of the graduates, and the required level of specialization and amount of investment in research and development on the part of the government. The former includes academic and professional knowledge, foreign language skills, as well as social and intercultural competencies. This rationale is closely linked to the globalization of professions, or the forming of agreements on professional profiles and standards initiated by professional associations on regional and international scales. "Internationalization of the professions generally implies a convergence towards international standards and procedures away from nationally defined standards and national forms of regulation" (Iredale, 2001, p. 10). The adoption of international standards prescribed in bilateral and multilateral agreements between national professional bodies (such as the Washington Accord) have profound implications for national higher education systems as they require harmonization of professional and/or academic standards. However, the impact of internationalization greatly depends on the context and nature of the profession. This means that not all professions will be, or must be, internationalized (see also Iredale, 2001). For example, in healthcare, differences in education standards, licensing requirements, training, or scope of tasks reinforce an overall need for standardization and assessment to protect patients and to make professionals more accountable. In other words, a common understanding of the 'code of conduct' or code of ethics – that is to protect patients, and be accountable – is a prerequisite for internationalization of the healthcare profession (Ribeiro, 2008, p. 202).

There is no clear-cut definition of the term profession. Most debates distinguish between profession and occupation and how the nature of professions change (Caza & Creary, 2016). Evetts and Buchner-Jeriorska (2001) describe professions as follows:

> Professions [are] one of the institutional contexts in which knowledge is controlled and transmitted, reproduced and changed. Professions are also institutions where access to knowledge as an economic resource is monitored, the transmission of knowledge is accredited and supply markets are closed. By such means the licensed professional practitioner is privileged in access to employment positions and, at the same time,

those employing or using licensed practitioners can be assured of a basic level of competence, expertise, commitment, and experience. This is the ideology of the professionals and, symbolically, it is a powerful differentiator of professional from other forms of occupational work (p. 133).

A profession is thus characterized both as a context for institutionalized knowledge and as an institution itself that controls production, transmission, and access to the status and privileges that that knowledge accords. It marks inclusion / exclusion by defining criteria for group membership through formal education and training (usually at the tertiary level), accreditation, licensing, and similar mechanisms. Thus, professions confer symbolic power to their members (cf. Stumbo, Martin & Ogborne, 2004). Although the use of the term profession has changed from noun to adjective, and the nature of professions have become increasingly complex and multidimensional, knowledge and skills gained through education are still the key parameters, rather than the specific kind of work (Caza & Creary, 2016).

Mallea (1998) as well as Iredale (2001) argue that international trade agreements have raised the profile of international trade in professional and educational services. These agreements include the Canada-U.S. Free Trade Agreement (FTA) in 1988, and subsequently the North American Free Trade Agreement (NAFTA) in 1994; the Canada-Chile Free Trade Agreement (1996), which mirrors NAFTA; the 1983 Australia-New Zealand Closer Economic Relations Trade Agreement (ANZCERTA), which led the way in adopting the Mutual Recognition Agreement (MRA) as an instrument; and the Association of South East Asian Nations (ASEAN) through its ASEAN Economic Area (Mallea, 1998, p. 4). Further, the inclusion of international trade in professional and educational services in GATS served as a catalyst for internationalizing several professional fields. Article XXIV established the Council for Trade in Services to facilitate the operation of GATS. In paragraph 4 of Article VI on Domestic Regulation, the WTO's Counci for Trade in services established the term 'disciplines' to refer to applicable trade regulations in services (Stumberg (2010). Arnold (2005) takes the literal meaning of discipline as controlling behavior by enforcing rules (measures or mechanisms) that delimit "local autonomy and the ability of national and subnational regulators to effectively govern" domestic service industry (p. 300), such that the rules have a disciplining effect on local regulators. As Stumberg (2010) argues, the legal language used in GATS' provisions is ambiguous and is thus open to various interpretations. GATS, if fully implemented, will have a profound impact on how national governments regulate service providers. Since GATS provides foreign service providers (or investors) access to domestic markets of Member countries, the articles cited above would imply application of the trade rules to natural persons and corporations. Article VII.5 also raises the question on how international standards could

be interpreted. In his in-depth analysis of the jargon used in GATS, Stumberg (2010) explains that the WTO Secretariat conceives of international standards as having an "element of perceived objectivity," because they "require a measure to be the least-trade-restrictive alternative" (p. 13). Keeping in mind that "GATS does not regulate trade; it regulates the regulators of services" (p. 1), the notion of international standards in the context of professions would imply a reference to national and sub-national regulatory (or domestic) bodies with regulatory functions in the recognition and practice of professions. These standards are usually determined by professional bodies in Western countries, such as in the United States and the European Union in the case of accounting. In accountancy, these standards effectively "preserve the power and prestige of the accountancy profession by seeking to dictate minimum standards of entry to the profession" (Phillips & Stahl, 2000, p. 15). The standards enable mobility of Western trained professionals around the world while limiting the ability of non-Western trained professionals to move. These agreements also have a direct impact on the training programs of higher education institutions as they try to ensure that their graduates meet the international standard expected of accountants (Iredale, 2001, pp. 10-11).

In 1995, the WTO established the Working Party on Professional Service, which was replaced by the Working Party on Domestic Regulation (WPDR) in 1999. This body is responsible for drafting trade rules or 'disciplines' relating to technical standards, licensing, and qualification requirements for all services sectors (WTO, 1998). Without going into the technical details of the disciplines, it suffices to mention that the main purpose of these disciplines is to ensure that domestic regulations affecting trade in professional services (i.e. qualification requirements and procedures, technical standards, and licensing requirements) do not impede international trade. These disciplines lay the groundwork for new disciplines covering other fields.

### 2.2.2.5. Mutual recognition agreement

One mechanism to resolve disputes on equivalency and reciprocity of professions is the Mutual Recognition Agreement (MRA). MRAs can be established between professional bodies, countries, or regions. Several MRAs have been established in the last decades and, although their scope and scale differ, they all have considerable impact on professions and on higher education systems (Mallea, 1998, p. 4). The MRA is one mechanism that facilitates the free flow or mobility of professionals in the field covered by an MRA through recognition of academic credentials (i.e. formal qualifications) and/or professional practice. One of the early MRAs to be established under the NAFTA is the Washington Accord (WA). Signed in 1989, the WA is an equivalency and reciprocal agreement between national accreditation agencies of professional engineering programs (usually four years in duration) at the tertiary level from

countries and territories covered by the Accord (International Engineering Alliance [IEA], 2015, p. 3). Originally called the Six Nation Accord, its six founding signatories are: The Institution of Engineers (Australia); The Canadian Engineering Accreditation Board of the Canadian Council for Professional Engineers; Institution Engineers Ireland; The Institution of Professional Engineers, New Zealand; The Engineering Council (United Kingdom with certain Chartered Engineering Institutions); and The Engineering Accreditation Commission of the Accreditation Board for Engineering and Technology (United States) (IEA, 2015). These national agencies mutually agreed that their academic programs (i.e. outcomes or graduate attributes and accreditation processes) are substantially equivalent. Substantial equivalency of academic programs or professional formation schemes remains one of the main conditions for gaining a full membership status in the WA. Substantial equivalence means that: "The overall outcomes achieved whilst not identical, are repeatable and effectively to the same standard, even if the means by which the outcomes are achieved or assessed are not similar" (IEA, 2015, p. v). Through their commitments to the conditions of the WA, signatories grant the same recognition, rights, and privileges in regard to registration or licensing to graduates of each other's programs. Thus, the WA facilitates mobility of engineers between, and benchmarking of professional competency standards within, its signatory jurisdictions (IEA, 2015). Futhermore, the Sydney Accord, which is patterned after the WA and similarly based on the principle of substantial equivalency, was signed in 2001. It covers qualifications at the tertiary level (usually three years in duration) in engineering technology. This was followed in 2002 by the Dublin Accord, which comprises tertiary-level qualifications in technician engineering (usually of two years in duration). Parallel to these Accords, there are three agreements that establish mutual recognition schemes for practicing engineers based on agreed international competence standards (not on earned qualification): the International Professional Engineers agreement (2001); the International Engineering Technologist (2003); and the Agreement for International Engineering Technicians 2015) (IEA, 2015, p. vi). The APEC Engineer Agreement (1999) is the oldest such agreement, but is only open to economies in the Asia-Pacific Economic Cooperation (APEC) (IEA, 2015, p. 2).

One of the most comprehensive MRAs in regard to the movement of skilled personnel is the Trans-Tasman Mutual Recognition Act (1997), a non-treaty arrangement between New Zealand and Australia's commonwealth, state, and territory governments (Australian Federal Register of Legislation, 2015).[3] This agreement is one of the key components of the Australia – New Zealand Closer Economic Relations Trade Agreement (ANZCERTA; also called the

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[3] Sourced from the Federal Register of Legislation on October 3, 2020. For the latest information on Australian Government law please go to https://www.legislation.gov.au.

CER Agreement) (Australian Department of Foreign Affairs and Trade, 2018).[4] Similarly, in ASEAN, the ASEAN Framework Agreement on Services (AFAS) signed in 1995 aims to enhance cooperation between member countries by promoting trade liberalization and mobility of skilled professionals (ASEAN, 2012). Under the Framework, several MRAs in professional services have been signed. To date, these include:

- Accountancy Services (2014);
- Architectural Services (2007);
- Dental Practitioners (2009);
- Engineering Services (2005);
- Framework Arrangement for the Mutual Recognition of Surveying Qualifications (2007);
- Medical Practitioners (2009);
- Nursing Services (2006); and
- Tourism Professionals (2012) (ASEAN, 2012).

In summary, the insertion of services as part of trade agreements has encouraged transnational operations of professions as well as the mobility of professionals within the jurisdictions covered by the agreements or MRAs. Although MRAs are usually part of trade agreements on services in line with WTO principles, the scope of MRAs varies from region to region and from profession to profession. In ASEAN, Gootiiz and Mattoo (2015) explain that despite the achievement of signing the MRAs on professional services, their implementation across all ASEAN countries remains a huge challenge due to gaps in the systems.

## 2.3. Higher education policy

Internationalization has another dimension that is not explicitly covered by the definitions discussed above but has been implied throughout. From the perspective of education policy, internationalization refers to the shifts in the policy process marked by new elements and networks of actors at all levels. These shifts create a new policy order that affects the role of national and local institutions, for example in matters concerning regulation, evaluation, or identification of policy goals (Jakobi, Martens & Wolf, 2010, p. 2). This development is relevant because education is one area of public policy with which voters have direct first-hand experience and where the public has a major stake and interest (Poguntke, 2009; Bell & Stevenson, 2006).

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[4] Sourced from the Department of Foreign Affairs and Trade on October 3, 2020. For the latest information on Australian trade agreements please go to https://www.dfat.gov.au/.

[…] education has always been linked very closely to citizens, politics and the state: Educational institutions exert a major impact on the life of citizens. Nearly all countries have introduced compulsory education, which requires citizens to spend a substantial amount of their lifetime learning either in school or at home […] As a precondition of national economic growth, education receives much attention (Jakobi, Martens & Wolf, 2010, p. 5).

Given the tremendous importance attributed to education, it figures prominently in the policy agenda of most governments and many international organizations: Thus, it is also a policy area that receives public scrutiny. Higher education institutions, as part of education systems, are one of the most complex organizational forms invented by humans, from their institutional structures, to the mission and visions they pursue, scope of activities, the amount of resources they receive, and to their physical set-up. As a key institution in the society, questions on how to govern higher education, such as the modes of control or regulation, effectiveness, or legitimacy of policy goals and policy process, have become fundamental issues (Austin & Jones, 2016).

One possibility to make sense of these transformations is to think through the term 'policyscape.' Taking inspiration from Apparudai's concept of ideoscapes, Carney (2009) coined the term 'policyscape' to describe the domination of liberal and neoliberal ideas in the educational ideoscape (p. 68). Ideoscape, according to Apparudai (1996), is the transnational flow of a fluid and dynamic "chain of ideas, terms, and images, including freedom, welfare, rights, sovereignty, representation, and the master term democracy" embedded in the ideologies of an Enlightenment worldview (p. 36). Migration and the intellectual diasporas paved the way (intentionally or not) for the mobility of these ideas across the globe. Applied to the field of educational policy, policyscapes "capture some essential elements of globalization as phenomenon (object and process) and provide a tool with which to explore the spread of policy ideas and pedagogical practices across different national school systems" (Carney, 2009, p. 68). In the current policyscape, according to Carney, policies and practices projected across educational spaces reflect 'globalized messages' in manners that resonate to specific contexts. These globalized messages are ideologically committed to centering the individual person in the learning process (e.g. lifelong learning, self-actualization, active learning, or learner-centered pedagogy) and, at least rhetorically, downplaying the relevance of the nation-state in educational delivery (p. 69).

### 2.3.1. Policy development

In simple and operational terms, public policy is a statement that defines a government's goals and priorities pertaining to an issue which could be relevant sector-wide (e.g. education), only to a specific sub-sector (e.g. higher education), or to a specific issue (e.g. funding scholarship in public universities). A hallmark of public policy is its alignment with a country's constitution and national aspirations. On a practical level, the feasibility of implementing a policy needs to be accounted for in the policy development process. Considerations to be taken into account may include limitations, constraints, possible trade-offs, as well as the remedial measures and increase in resources that the implementation requires (UNESCO, 2013, p. 7). While a policy strategy sets the direction for how to achieve the policy goals and the roles of the various stakeholders, the policy plan maps out in detail the targets, timeline, scope of activities, required resources, and distribution of responsibilities (UNESCO, 2013, p. 6). In addition, the criteria for assessment and evaluation, as well as contingency plans, need to be identified in the plan.

Rizvi and Lingard (2010) remark that although older accounts of policy process are still valid, the conditions that now frame education policy are often affected by global processes and other factors beyond the nation-state even though it remains to be articulated in national terms (Rizvi & Lingard, 2010, p. 3; Jones, 2013). On the same note, there is a new range of actors involved in policy development. In the contemporary context, private and public partnerships (or PPP) are common, resulting in the involvement of the private sector (e.g. private organizations, companies, and institutions) in education policy processes (cf. Patrinos, Barrera-Osorio & Guáqueta, 2009).

Public policy refers to the actions and positions taken by the state. It expresses patterns of decisions made in wider contexts by political actors who are in the position to represent state institutions (Rizvi & Lingard, 2010, p. 4). Despite long-standing debates on the concept of the 'nation-state' and the nature of its authority and legitimacy, there is general agreement that 'nation' refers to cultures and histories of a society within a bounded space, while a 'state' refers to the bureaucratic organizations of that nation (Rizvi & Lingard, 2010, p. 13). Additionally, a state is more than its government. It is comprised of institutions (e.g. the executive, legislative, judicial, a bureaucracy, and others) characterized by their legitimacy to operate and exercise authority over public matters (such as distribution of wealth and resources), often with legal or statutory dimensions. Although state institutions are formally established and structured, their behavior as institutions emerges from an underlying set of rules and practices which may or may not be formal (Rizvi & Lingard, 2010).

The state, then, is crucially involved in the political organizations of policy processes in all phases of the policy cycle, including the politics of implementation. Furthermore, the ways in which its own structures are defined have implications for the actual focus and content of policies, as well as in relation to the discourse that frame them (Rizvi & Lingard, 2010 p. 10).

Nevertheless, the role that the nation-state and its institutions play in policy processes also raises questions of legitimacy and authority. Likewise, the conceptual distinction between power and authority is not clear-cut in the field of public policy and, by extension, in educational policy. In some cases, the nation-state, through public policy, claims authority over a particular topic without ever securing consent from the concerned community. Such a situation masks an exercise of hegemonic power "where common sense goes unchallenged" (Rizvi & Lingard, 2010, p. 12).

Public policy is often synonymous with collective decisions. Therefore, an individual decision made in isolation does not constitute a policy. "Public policies are thus normative, expressing both ends and means designed to steer the actions and behaviour of people […] in matters over which authority can be exercised" (Rizvi & Lingard, 2010, p. 4). This definition indicates the fundamental dimensions of public policy. It is a process that entails specific actions that involve a set of actors and other stakeholders and elicits responses from them, e.g. in agenda-setting, production of policy texts, deliberation and negotiation, planning, assessment, evaluation, etc. It is also a product with specific outcomes and outputs. Policy text broadly refers to the content of the policy itself, although it is not restricted to legal documents. Policy text can include speeches, press releases, policy papers, and other documents in any vehicle or medium that express policy intentions and have real effects (Rizvi & Lingard, 2010, p. 5). This raises fundamental questions about the production of the policy text, and the text itself, as a product of that process, such as the manner of articulation and framing, and the aims, values and prescriptions that the policy text and the process of its creation explicitly and implicitly convey (Bell & Stevenson, 2006, p. 12). As an output, policy text gives materiality to the policy. It makes policy 'tangible' and accessible (even if, for instance, the purpose is only symbolic). On the other hand, it is also an outcome because it defines purposes, aims, and goals that justify why there is a need for policy and the impact that a policy could or should have (regardless of what the actual outcome may be). However, as will be discussed below, public policy as a process, outcome, or output – here referred to as policy development, following Bell & Stevenson (2006) – is never clear-cut or straightforward. More importantly, public policy is about the desire to change, or the perceived need to reform (education) systems. As such, it offers and articulates an imagined future, albeit eschewing the actual

realities of practice (Rizvi & Lingard, 2010, p. 5). Given the level of generality, public policy can be understood more as a framework, or general instructions, like a recipe, instead of a blueprint. Consequently, it also leaves room for interpretation. It is designed as a guide to steer understanding and action in a certain direction "without ever being sure of the practices it might produce." Hence, policies result in intended as well as unintended consequences (Rizvi & Lingard, 2010, pp. 5-8; Jones, 2013, pp. 8-9). The phrase policy development captures the organic nature of the policy process without attenuating the powerful effects of social, cultural, or economic forces and the crucial role of human agency (Rizvi & Lingard, 2010, p. 9).

Education policy is a dialectical process, a complex case in which those affected and involved "with competing values and differential access to power seek to form and shape policy in their own interests" (Bell and Stevenson, 2006, p. 2). Hence, policy is political; it determines what is to be done, who will benefit, who pays, and what purposes policy serves. "It goes to the very heart of educational philosophy – what is education for? For whom? Who decides? (Bell & Stevenson, 2006, p. 9). W. J. Cohen made a similar statement about politics in education in the USA in 1973, declaring "that no discipline exists in a purely neutral state" (p. 127). I concur with Cohen (1973, pp. 128-129) who pointed out the critical importance of political actions because they present "opportunity for wider participation in the determination of educational goals" by those within the sphere of education. According to Bell and Stevenson (2006, p. 15, citing Kogan, 1975), education policy is the prescriptive statements of intents, of operational statements reflecting values, and the authoritative allocation of those values in pursuit of political objectives (cf. Ball, 1990). This definition, they argue, locates policy in the wider context of fundamental questions in the society. It is essentially a continuous discursive struggle over what counts as important in defining the issues and the framing of problems, the shared meanings that motivate policy goals and policy responses, how the public understands them, and the criteria for evaluating their effectiveness (Fischer & Gottweis, 2012, p. 7). It reflects the stance of the policy actors on specific issues or problems. Policy actors "are those individuals and groups, both formal and informal, which seek to influence the creation and implementation" of policy, from agenda-setting to implementation and assessment of policy outcomes (Cahn, 2012, p. 199). Policy outcomes are determined by the role each of the policy actors plays and the relationship between the actors (p. 200). Policymakers, in the classic definition, are usually regarded as those from the state institutions (e.g. legislators, administrators, the executive, and the judiciary). However, practitioners (e.g. school leaders, university administrators, and representatives of education organizations, etc.) can also actively influence the policy process, particularly in its implementation phase. Thus, in this research, policymakers are understood to include those who can directly influence and shape policy and its translation into practice (Rizvi & Lingard, 2010, pp. 5-6; Bell & Stevenson, 2006).

### 2.3.2. Policy types and purposes

While the type of policy will depend on the purpose it serves, the purpose of a policy will determine how the policy itself will be articulated (Rizvi & Lingard, 2010, p. 8). Symbolic policy exemplifies policies that express or seem to express an intention, but have little application in practice. Symbolic policies are usually a response to political pressures, so the level of commitment to implement and fund them is often wanting. However, this is not to say that they do not have any effects or influence. On the contrary, symbolic policies can be invoked to legitimize a political view or to frame issues and problems. Material policy, in contrast to symbolic policy, is strongly orientated towards implementation. Such policies therefore receive funding allocations and are accompanied by evaluation and assessment mechanisms to determine their effectiveness or utility. "The symbolic/material distinction then turns on issues of resourcing and commitment to implementation, and in some cases strong sanctions" (Rizvi & Lingard, 2010, p. 9). Incremental policy, as the term implies, is produced in small amounts or series. It is usually built on or developed out of other policies. It also signals small, step-by-step policy development and change. Essentially, all policymaking has incremental aspects to it (p. 9). Rational policy, on the other hand, is "pointedly prescriptive" (p. 9). It is directed to, and provides policymakers with, specific directives and prescriptions for actions to be taken. As a process, it follows the rational approach or distinct linear phases of policy development: identification of problem, formulation of policy, implementation, and evaluation or assessment (p. 10). Yet, as previously discussed, policy development does not usually occur in a rational, linear pattern. Policies can also be either distributive or redistributive. While the purpose of distributive policy is "simply to distribute" resources, redistributive policy "seek(s) to intervene against disadvantage through positive discrimination," albeit this does not necessarily involve financing (p. 11). These distinctions are useful in recognizing the basic purpose of a policy, particularly in regard to the use of policy as an instrument, the allocation of resources, or the extent of implementation. Nevertheless, polices are never absolute, and in practice, they can serve several purposes simultaneously (Rizvi & Lingard, 2010, p. 11).

### 2.3.3. Values in policy

The issue of values is central to policy (Rizvi & Lingard, 2010, p. 7; Jones, 2013, p. 5). Following Kogan, Bell, and Stevenson (2006, p. 15) state that values are at the heart of understanding educational policy. They note key values that underpin and inform educational policy and place the values in a hierarchy that mirrors their relative importance in policy development. A society's basic values are those that are educational, social, and economic in nature. These are considered instrumental and indicate what 'ought' to be, thus they do not need justification or defense as they are legitimate in their own right. Secondary or sequential values are justified

to the extent that they support or are useful in advancing the basic values. They are concepts that carry the argument into the zone of consequences, instruments, and institutions, in other words, in locations and spaces where educational policy materializes (Bell & Stevenson, 2006, p. 15). Policy is value-laden. In any given policy, values are either implicit or explicit, and can be articulated in many ways for a variety of purposes (Rizvi & Lingard, 2010, p. 7; Jones, 2013, pp. 5-7). Thus, it needs to be emphasized that conflicts regarding values play out more in the policy development process than in the text (or outputs) itself. In the development process, policy becomes (re)contextualized as it is being implemented (Bell & Stevenson, 2006, p. 17). This means that policy development does not occur in a simple linear fashion, but is messy and filled with tension. For this reason, it is better to speak of a policy cycle. There is no automatic agreement on what values must be given precedence in education policy (p. 17). As Ball (1990) contends, education policies project images of what counts as education, or what the ideal condition in the society is. Based on this logic, education policies cannot be separated from broader societal issues such as interests, conflicts, domination, or justice (p. 3). Educational policy does not merely reflect the interest of (a) group(s), but is a response to "complex and heterogenous configurations of elements (including ideologies that are residual or emergent, as well as currently dominant)" (Ball, 1990, p. 3). At the same time, education policy is influenced by wider structural elements in the society that powerfully limit the ability of individual actors to shape policy (Bell & Stevenson, 2006, p. 18). This purview draws the attention to issues of power in policy development and reinforces the two-dimensional nature of policy: as a process (capacity to operationalize values) and as a product (outcomes and outputs; statements of strategic, organizational and operative values).

> Conceptualizing policy in these twin terms emphasizes the intensely political character of policy. Policy is about both the identification of political objectives, and the power to transform values into practice through organizational principles and operational practices. This emphasis on policy as process recognizes that values by definition are not neutral (Bell & Stevenson, 2006, p. 18).

Rizvi and Lingard (2010) also maintain that non-action or non-decision-making is also a manifestation of policy and power. Silences, whether deliberate (by suppressing issues) or unplanned, are as much an expression of policy as the actual decisions made (p. 4). These statements accentuate the contested nature of values and the complexity of policy development. They underline a conception of policy that is subject to conflict, negotiation, and compromise. Thus, these complex conditions determine the parameters of policy analysis. Similarly, education as a social field is inherently ideological and cannot be separated from the wider contexts and environments wherein educational policy develops.

Additionally, Rizvi and Lingard (2010) emphasize that "just as policies embody particular values, so does their analysis." This implies that the 'positionality', or the standpoint and perspective of the researcher or the analyst, is crucial in the interpretation of the policy context, in the choice and use of theoretical and methodological resources, and in the articulation of analyses or recommendations. Positionality in this regard relates to four circumstances.

- The status of the policy researcher or analyst in relation to the policy work being undertaken. For example, the policy frames used by a doctoral student can be different from the frames used by an education practitioner or a government administrator (p. 46).
- The modes of scientific inquiry which will influence "the intellectual resources" of the analyst/researcher and will bear on the conceptual (ontological and epistemological) and methodological choices (pp. 46-47). Rizvi and Lingard, for example, note the proliferation of 'policy as numbers' research (research for policy) focused on evidence and measurement of performance. Such an approach is usually driven by "rationalist engineering models" employed to make policy actors accountable (p. 47).
- The geospatial positionality of the researcher/analyst, "specifically national location and the positioning of that nation in respect of global geopolitics, including location within the Global North/Global South divide" (p. 47).
- The temporal positionality or the chronological considerations in the policy development (p. 48).

However, the authors caution on the dangers of essentializing these categories, arguing that the difference lies in the geopolitical positioning of the researcher/analyst. An example is the constraints that countries from the Global South face in developing education policy. Spatial positionality also refers to the epistemological position in regard to the production of knowledge and theories in social sciences, "how modern social science embeds the viewpoints, perspectives and problems of metropolitan society, while presenting itself as universal knowledge" (p. 48; Connell, 2007). This kind of positionality also relates to the national location of the researcher/analyst because it indicates constraints in terms of the research or information resources available (p. 48). For instance, in the Global South, many of the research conducted is commissioned by donor agencies (i.e. OECD, WB), which has implications on the analysis and research options (intellectual resources). In summary, the discussion on values and positionality underscores the importance of taking a historical approach to understanding the implications of globalization on educational policy development (Rizvi and Lingard, 2010, p. 48).

### 2.3.4. Policy research and analysis

Policy research takes different forms and largely depends on the goals of the researcher. Weimer (2009) explains that policy research generally focuses on specific issues. The goals of policy researchers are twofold; to evaluate the impacts of the policy and to offer generic applications of policy alternatives. Policy analysts, on the other hand, make explicit judgements based on a range of social values to solve a problem. Hence, they specify concrete alternative courses of actions (p. 94). Basically, policy research could either be analysis *for* policy, or analysis *of* policy (Gordon, Louis, & Young, 1997, p. 26; italics in original). Rizvi and Lingard (2010) define analysis *for* policy as an activity that contributes to actual policy production done from within the educational system, for example to reform existing policies. Analysis *of* policy is a more critical activity which aims to gain insight in the political processes of policy development to hold policy actors accountable.

- Policy for advocacy aims to promote either a specific policy or a set of related policies. Researchers offer their conclusions as recommendations. However, in cases where a strong commitment to a specific policy predates the research activity, policy advocates often consciously or unconsciously shape the conclusion to support the case to be argued (Gordon, Lewis & Young, 1997, p. 26).
- Information for policy aims to provide policy makers with background information and advice. Research activity is usually premised on the need for action (eg. to solve a specific problem) and may suggest new policy or the modification of existing policy (p. 27; Bell & Stevenson, 2006, p. 10).
- Policy monitoring and evaluation is the most common form of policy research. It is concerned with overseeing policy implementation and assessing its impacts, although it could also deliberately aim to influence future policy developments (pp. 10-11).
- Analysis of policy determination emphasizes the policy process itself, how the policy developed, and aims to illustrate the conditions under which the policy emerged and why it emerged the way it did (p. 11).
- Analysis of policy content is interested in the origin, intentions, and operations of specific policies. It is usually conducted for academic interest (p. 11).

The categories presented here provide a simplified view of the distinctions in approaching policy research and analysis. They are not mutually exclusiv, and employing one category does not preclude the others. On the contrary, research oriented towards both the analysis of policy and the analysis for policy can be productive. As previously noted, the policy development process is very intricate and a simple categorization of policy activities cannot wholly capture its complexity. Analysts must recognize that policy develops in fragmented ways, involving a

myriad of actors who are active on multi-scalar levels and operate in specific environments (Robertson & Dale, 2008, pp. 7-9). In regard to evaluative research (analysis for monitoring and evaluation), Bell & Stevenson (2006) stress that researchers' claims to objectivity are problematic because evaluation and assessment are motivated behavior and the highly politicized policy context within which evaluation takes place can present very distinct methodological challenges in analyzing educational policy (p. 11). These remarks stress anew the situation-specificity of education policy and the role that researchers play in the process.

### 2.3.5. Policy as discourse

In this research, I also follow the argumentative turn in policy analysis that perceives language as historically structured and socially constructed. Language is understood here as arbitrary in nature; it does not only reflect what is considered as real, but it is a constituent of how reality is constructed (Fischer & Gottweis, 2012). The argumentative turn in policy analysis recognizes language as part of the problem, "as a *medium*, a system of signification through which actors not simply describe but *create* the world" (Hajer, 1993, p. 44; italics in original). An examination of linguistic representations of a phenomenon shifts the questions from technical facts to processes which Hajer (1993) terms mobilization of bias:

> Here I argue that the analysis of discursive constructions such as narratives is especially powerful in the context of the study of the social-historical conditions in which the statements were produced and received. In this case it is better to speak of an argumentative turn instead of a linguistic turn (p. 45).

To understand the argumentative context, it is necessary to consider the various positions presented, how they are justified, and the counter-positions made. In the same manner, Fischer and Forester (1993) raise their concerns about representing truth and reality from the perspective of the policy analysts. They contend that policy analysts, as with anyone in the policy community, are bound to individual assumptions about the various aspects of the policy issues, such as needs, interests, preferences, obligations, and values (p. 1). Their idea supports the claim that the policy process, and the concomitant analysis, is theory- and value-laden. This means that 'facts' are only facts within a set of theoretical frameworks, while theories are imbued with values and, as such, are themselves value statements (Guba & Lincoln, 1994, p. 107). "Policies have discursive effects, often changing the language through which practitioners engage with policy in practice" (Rizvi & Lingard, 2010, p. 7). Rizvi and Lingard (2010) further punctuate the effects of discourse in framing policy issues. The authors argue that the nature of the problem and the policy context are never self-evident but are always constructed and presented in a specific way, from a specific view. "Policies thus proffer solutions to the problem as constructed by policy itself" (p. 6). McLaughlin (2006) calls this the

"problem of the problem" to indicate the ways that problems are framed to provide legitimacy to a policy proposal (p. 2010).

> We use the notion of 'social imaginary' to suggest that policies are not only located within discourses, but also in imaginaries that shape thinking about how things might be 'otherwise'—different from the way they are now. It is in this way that policies direct or steer practices towards a particular normative state of affairs (Rizvi & Lingard, 2010, p. 8).

In other words, the policy process, as well as policy texts and indeed policy discourses do not occur in material vacuums (Rizvi & Lingard, 2010, p. 14). At the base of the analysis are the policy arguments employed by the agents in the policy constellation. Therefore, examination of the policy process requires careful attention to the social construction of the normative policy frames and the contentions and power struggles that occur in the process (Fischer & Gottweis, 2012, p. 2). Thus, the argumentative turn in policy analysis is oriented towards the communicative practice itself (language, its meaning, and representations), the context in which it occurs, and the social relationship between the policy actors. It underlines the critical role of discursive reflections and argumentations in the policy analysis and in understanding the dynamics of the policy process (p. 6). In the preface to his book, *Public Policy Analysis*, Dunn (2012) argues that to be productive, policy analysis requires an interdisciplinary approach and should not be reduced to one single field. Its aims are not to produce knowledge for knowledge's sake, but to improve policies (p. xvii).

There are basic structures to understanding education policy. In this research, the basic model — text, content, and consequences — introduced by Taylor, Rizvi, Lingard, and Henry in 1997 (pp. 15-17) is complemented by the ideas of other scholars. To underpin the model, I reiterate here the general characteristics of education policy which have been discussed in detail in the preceding sections.

1) Policy is multidimensional. This means that policy is more than the text that policymakers produce and includes the social and meta-practices (in the form of a discourse) that are associated with policymaking (also Mundy et al., 2016).
2) Policy as a process and as a product are value-laden.
3) They do not exist in a vacuum, but are (re)created within a specific context.
4) Although the influence of new policy actors can no longer be disputed, education policy remains primarily a state activity.

5) In relation to the first three points, the policy process is neither straightforward nor is it neutral. It is affected by broader national goals, policy developments in other areas (such as national economy), as well as non-state national and international stakeholders.

6) Attributable to the level of its generality, policies result not only in intended consequences, but also in unforeseen outcomes (Taylor et al., 1997, pp. 15-17).

As suggested previously, one must keep these considerations in mind when undertaking education policy analysis. They serve as signposts to remind the analysts, on the one hand, of the complexity of the policy process, and, on the other hand, of the effects and implications of these dimensions on the analysis itself, regardless of the methodological approach employed.

## 3. Historical context of the Philippine education system

> Since the mass of humanity is still in a state of poverty and ignorance, since a few nations have attained advancement and development at the cost of consigning others to underdevelopment, what has hitherto been regarded as history is predominantly a conscious record of the rich and the powerful but by no means the just and the correct (Constantino, 2008, p. 4).

This section is a critical element of this research. It offers an overview of how the Philippine education system developed from its colonial roots to its current conditions. The recounting of the development of the Philippine education system is critical to the foregoing analysis because it delineates how trends associated with internationalization of higher education such as privatization, deregulation, and mobility of individuals, are rooted in the country's colonial history and thus are not as current as common literature on internationalization suggests. Identifying the first Philippine universities is likewise important, as these institutions remain key stakeholders in the HE sector exerting their influence in the policy process through different channels. It is also noteworthy how the religious orders, particularly the Jesuits and the Dominicans, still play a powerful role in the country's education system, from primary schools to higher education.

Discussing Philippine history is a thorny enterprise as many historians, both locals and foreigners, have aggrandized one colonial ruler over the other (i.e. Spain vs. USA), failing to recount the atrocities committed in the name of colonial conquest. Others have written celebratory accounts of individual persons, creating myths and illusions, consigning the agency of the masses to inarticulation and thus to immateriality. Historical accounts that focus on the Philippines alone are also problematic, as they tend to dismiss the profound influence of global developments, including the historical developments in Spain and the USA, on the Philippines and the Filipino society (Constantino, 2008). However, it is not possible to discuss the history of the Philippines and its people at great lengths within the scope of this research.[5] This weighty task has been undertaken by many scholars and I have referred to some of them in this chapter. What I offer is a brief description of selected socio-historical elements of the Philippines as a state and as a society. These insights on important historical junctures will help make sense of the country and its people in a global network of actors. As Constantino puts it, history records the collective struggles and the people who are motivators of change (2008, p. 3). This section underlines the agency of the masses in making Philippine history,

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[5] For example, Constantino (2008) offers a rigorous account – from the point of view of a Filipino – of the history of the Philippines and its people from the Spanish colonization up to World War II.

and the global conditions in which the Philippines, as a polity, emerged. The Philippine higher education is a labyrinth of systems and structures deeply mired in politics. Its current state and policy orientations cannot be separated from the country's historical roots and from the multiple socio-cultural realities of Philippine society. Its education system is one of the most enduring legacies of two powerful colonial forces that successively took control of the islands: Spain from 1565 to 1898 and the U.S.A. from 1898 to 1946.[6] Any attempt at contextualization that neglects these salient facts is a futile exercise. Consequently, the genesis of the higher education system in the Philippines can be loosely categorized into three temporal contexts: the Spanish colonial era, the U.S. American period, and post-independence epoch. The descriptor 'loosely' used in this context needs to be taken at its face value as there are continuities and disruptions in the development of institutionalized learning in the country. Thus, the periodization I suggest here is a synthetic marker that is primarily useful in organizing the discussions I present. Most importantly, it is not my intention to discount the systems of learning practiced on the islands prior to the arrival of the Spanish conquistadores. On the contrary, I would argue that these indigenous practices influenced and continue to bear their imprints on the institutionalization of the Western models of education in the Philippines (cf. Milligan, 2006).

## 3.1.    Pre-colonial era

Schwartz (1971) contended that "beneath the educational policies and practices of Spanish colonialism was a relatively cohesive body of fairly independent Filipino educational activity…" (p. 202). Unfortunately, there is a scarcity of scholarly accounts of indigenous education in pre-colonial Philippines which limits the scope of discussing its history. The Department of Education briefly describes it as "informal, unstructured, and devoid of methods," focusing on vocational training rather than academic pursuits (i.e. reading, writing, and arithmetic) (www.deped.gov.ph). As such, teaching is done at home by the parents or the tribal tutors. These statements imply learning activities that occur in a random manner and dismiss the methods of experiential learning practiced by the indigenous communities. For instance, in the case of the Ifugaos, education is done through sharing of stories, apprenticeship, interactions with the elder family members, and participation in the community life through rituals, ceremonies and festivals. The goals of education are to transmit indigenous knowledge, train for subsistence-based professions, and to instill the collective values of cooperation and

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[6] Most literature on the colonial history of the Philippines begins by mentioning the arrival of Ferdinand Magellan in Cebu, Mactan in March 1521. Spain followed this eventful occasion with five subsequent expeditions to the islands, however, it was not until February 13, 1565 with the arrival of Miguel López de Legazpi in Cebu that it was able to establish its first colonial settlements on the islands.

selflessness (Adonis & Couch, 2017, pp, 201-206).[7] Moreover, Alzona (1932) argued that, prior to colonization, the indigenous population already had a structured system of schooling:

> Formal education was known to the Filipinos. They had schools in which children were taught reading, writing, reckoning, religion and incantation, and fencing for self-defense. In the southern part of the Islands, (in Panay, for instance), there were schools which taught the Sanskrit which was then the official language of the neighboring island of Borneo; arithmetic, including the decimal system; the art of acquiring personal invulnerability; and the effective use of weapons for self-defense. (p. 10).

Although Alzola's account cannot be generalized to apply to all the indigenous communities in the archipelago, it should not be ruled out. For one, it concurs with the claim of some scholars that a substantial area of the archipelago – from Sulu in the south to Manila in the north – was a part of the Javanese Majapahit Empire which existed between the 13th and 16th centuries (Anwar, Zulayti & Wan Ahmad, 2016). During this period, the language spoken in the archipelago was Hindu-based Old Malay, which was considered a prestige language at that time (Adelaar, 2004). In his book *Sucesos de las islas Filipinas*, Antonio de Morga (1609/1903-07 by Blair & Robertson) wrote vivid descriptions of the peoples and communities that inhabited the islands before the conquest including their appearance, their existing trade activities with China and Japan, their skills in occupations such as seafaring and navigation, weaving, agriculture, fishing, carpentry, mining and the likes, their stratified social organizations, and their social and cultural practices (such as the great attention they gave to hygiene and bathing, their elaborate clothing and accessories, attitudes towards marriage, as well as legal practices (i.e. arbitration). In their annotations, Blair and Robertson (1907) stated that the remarks of de Morga "and those of other historians argue a considerable amount of culture among the Filipino peoples prior to the Spanish conquest" (p. 307). Indeed, archeological artifacts from extensive coastal settlements on the islands point to specialized craft production areas and status differences in burials, which signify "the presence of organizationally complex and perhaps socially stratified communities" during the late first and second millennia (Junker, 1990, p. 167). De Morga also pointed out the existence of an ancient syllabary or writing system, now known as *baybayin* or *surat*. The Calatagan pot inscription

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[7] However, these practices have also been declining in the last decades as a result of the implementation of formal schooling in the archipelago since the 1900s. In 1997, former President Fidel Ramos signed the Republic Act 8371, also known as the Indigenous Peoples' Rights Act (IPRA). However, funding and implementation has been wanting since then. It was only in 2011 that the Department of Education issued the National Indigenous Peoples Education Policy Framework (IPEd) (DepEd Order No. 62, s. 2011 or "DO62") and in 2015, it formulated its corresponding curriculum to support the IPEd framework (http://www.deped.gov.ph/press-releases/deped-issues-iped-curriculum-framework).

(CPI) and the Laguna copperplate inscription (LCI) are two of the rare pieces of archeological evidence for the existence of *baybayin* found in the Philippines. *Baybayin* is a Tagalog term which literally means "to spell," whereas *surat* is a term indigenous to Southeast Asian countries which exclusively refers to writing. This attests to the closer links between the inhabitants of the islands and their Southeast Asian neighbors. Although the baybayin or syllabaries of the different indigenous communities share some common fundamental characteristics, each has distinctive traits and usages (Guillermo & Paluga, 2011).

Many scholars have questioned the accuracy of de Morga's descriptions, particularly in regard to the level of literacy of the indigenous peoples, their fluency in one common language, as well as the origins of the scripts. Scott (1992) has reasons to doubt that literacy was equally high amongst the different indigenous groups. Spanish records show high-ranking men and women who did not know how to write, let alone sign a document. Also, in the case of the Visayans, he argues that Baybayin was only used in personal messages and letters, or for written charms or spells. "It is most unfortunate but not particularly surprising that no prehispanic Visayan literature has survived. Filipinos did not use their alphabet for literary composition, and friar ethnographers did not record oral literature" (p. 105). This implies that literacy in the *baybayin* script was not as widespread as de Morga has suggested. With the spread of Spanish and the creolization of Tagalog, the ancient script became extinct (Wade, 1993). Nevertheless, his descriptions correspond to other historical accounts.[8] The same script was used and illustrated in the *Doctrina Christiana* (Anonymous, 1539).[9] Considered as the first book ever printed in the Philippines, it was a prayer book in Spanish with Tagalog translation in the Roman alphabet and in *baybayin* scripts (Wolf 2nd, 1947). The *Boxer Codex* (Souza & Turley, 2015) also mentions a system of traditional writing used for personal messages.[10] Likewise, Woods' (2011) linguistic analysis of counting and marking time in the precolonial Tagalog culture reveals a "view of reality with a strong quantitative component and a penchant for numbering" (p. 338). Original Spanish documents from the 15th and 16th centuries also show how the indigenous peoples, presumably from the central region, had the habit of carrying scales in their pockets in case an opportunity to trade or exchange silver (or gold) arose, indicating a tradition or custom of weights and measures (Scott, 1978).

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[8] There are only three groups who have managed to preserve their own variations of the script – the Buhid, Hanunoo and Tagbanwa who live in isolation in the islands of Mindoro and Palawan – although they too are fighting against the extinction of their tradition. As part of reconstructing the national identity, there are some nationwide efforts to preserve the ancient *baybayin* (Lowe, 2014).

[9] Wolf 2nd (1947) attributes the translation of Doctrina Christiana from Spanish to Tagalog to the Franciscan friar Juan de Plasencia.

[10] The *Boxer Codex* Spanish manuscript is a special source of information on 16th century history, geography and ethnography of the Western Pacific, and maritime and continental Southeast Asia and East Asia (Souza & Turley, 2015).

To borrow from Scott (1978, p. 174), these vignettes can only offer fleeting glimpses of the precolonial peoples in the Philippines through the cracks of the parchment curtain, based on archives and documents written by foreigners. Nevertheless, one could speculate that, like its contemporary societies, the peoples of the islands had a concrete and structured concept of education prior to the arrival of the Spanish colonizers. Although the evidence presented here is circumstantial, a closer inspection could lead to a better understanding of the history of education in the Philippines. As Scott (1992) emphasizes, ideas and notions about the precolonial peoples need to change. Despite the sparsity of documents, they do suggest a population that was:

> […] vigorous and mobile […] adjusting to every environment in the archipelago, creatively producing local variations in response to resources, opportunities and culture contacts, able to trade and raid, feed and defend themselves. The facts stand in sharp contrast to the passive Philippine population depicted in grade school texts, a kind of formless cultural clay ready to be stamped with patterns introduced from abroad (p. 12).

It is necessary to emphasize that different peoples have travelled to/from/across the archipelago from time immemorial, bringing with them their ideas and cultural practices. The various local responses to these economic and culture contacts influenced modern Philippine society, particularly in the sphere of education.

## 3.2.    Spanish colonial education policies

The Spanish colonial government devised a system of ethnic stratification to allocate tax levies, distribute rights and privileges, determine access to occupation and the spatial organization of the population, and determine access to education particularly higher education. Although the stratification was similar to the system the Spanish used in Latin America, it was more complex and restrictive in terms of social mobility for non-Spanish ethnic groups. The Spaniards based these categories on "purity of blood" (Santiago, 1991, p. 139). Every account of the history of education policies in the Philippines usually begins with the colonization of the country by Spain. Although it has become a cliché, the colonial policies (or their absence) are indeed crucial starting points. From the onset, the Catholic religion played a central role in the education of the Filipinos. In the case of the Philippines, according to de Morga, Spain freed the Filipinos from their "yoke and [the] power of the demon" and thus converted them to be "under the command and government of the Faith" (1609, p. 3). The Filipinos, then, were, in his eyes, conquered by the "sovereign light of the holy gospel" (p. 3). Indeed, there could have been no colonization without the proselytizers who used formal schooling for their groundwork.

From 1565 until 1863, the colonial education system was under the complete control of the Catholic church (Hardacker, 2012). Ideally, instruction in schools was to include Spanish, academic training (reading, writing, arithmetic), and various handicrafts (Schwartz, 1971, p. 203). There were mainly two levels: *primera enseñanza* (catechism/parochial schools at the primary level) and *segunda enseñanza* (five-year secondary education focusing on Latin Grammar and Classics). However, the quality and content of education depended on the wealth, social and ethnic status, and geographic location of the children and their families (Hardacker, 2012, p. 9). This created two parallel systems of private education: catechism schools for indigenous Filipinos and another set of schools for the children of Spaniards (Orata, 1956; Schwartz, 1971). While instruction in catechism schools was mainly focused on religious indoctrination "and enough reading and writing to make Filipinos aware of and enable them to fulfill their religious obligations," instruction in the schools for Spanish children followed the Spanish system (Schwartz, 1971, p. 203).

Except for the Colegio de San Ildefonso established in Cebu in 1595 by the Jesuits, the first institutions that provided secondary education were located in Manila: the Jesuits founded the College of Manila in 1595 and the College of San Jose in 1601; while the Dominicans founded the Colegio de Nuestra Señora del Santisimo Rosario, later renamed Colegio de Santo Tomas, in 1611, and, in 1620, endowed the Colegio de San Juan de Letran, an orphanage for Spanish boys. Except for Letran which admitted Indios at the primary level, these colleges only admitted sons of Spaniards to both primary and secondary levels up until the first half of the 17th century (Santiago, 1991, p. 136). There were also colleges and beaterios for Spanish girls, however, they mainly offered primary-level instruction on religion and in domestic art (Santiago, 1991, p. 136). The College of Santa Potenciana, founded in 1589, was the first to admit girls from elite families, while the College of Santa Isabel which was founded in 1632 was for orphaned daughters of Spanish military personnel. Evidently, secondary education during this period was for the exclusive benefit of the Spanish youth. In 1645, the College of San Juan de Letran began enrolling Indios in the *segunda enseñanza*, while the College of San Jose allowed the admission of Indios from the province of Pampanga (Santiago, 1991, p. 136). The *ilustrados* (literally translated as the enlightened ones) from the elite *principalia* class or pre-Hispanic indigenous nobilities later emerged from this generation of students at the College of San Jose (Santiago, 1991, p. 136). The Spanish monarchy failed several times to establish a basic public education system in the Philippines because the colonial administrators were either unable, or refused, to implement the decrees issued (Hardacker, 2012). The geographical separation from mainland Spain aggravated the conditions in the archipelago and provided less incentive for the colonial administrators to effectively implement any education policies. Education thus remained confined within the teachings of religion.

The same colleges founded by the Jesuits and the Dominicans evolved into institutions of higher learning. After the *segunda enseñanza*, select students could further study philosophy, arts and humanities, and theology or divinity to gain a baccalaureate degree, a licenciate, a master's degree, or a doctoral degree depending on the length of study and the examinations the student successfully passed. Faculties of Canon Law and Civil Laws were later added. The main purpose of higher learning was to join the clergy. In 1621, King Philip IV of Spain granted the College of Manila (also called Colegio Semenario de San Ignacio; now called Ateneo de Manila University) the status of a royal and a pontifical university, the first university in the Philippines and the first university in Asia patterned after the Western (Medieval Europe) model (www.ateneo.edu.ph). In 1645, Pope Innocent X elevated the College of Santo Tomas to university status and it became the University of Sto. Tomas (now known as UST) (www.ust.edu.ph). In 1785, King Charles III granted it the status of a royal university. In 1865, the monarchy granted power to the UST to supervise and direct all the schools in the Philippines (this changed under the U.S. American rule). In 1902, Pope Leo XIII conferred to UST the title of 'Pontifical University,' and by 1947, Pope Pius XII granted it the title of 'The Catholic University of the Philippines.' Both the College of Manila and the College of Santo Tomas admitted only *peninsulares* and *insulares*.

> It was very clear that in the beginning, contrary to royal intentions, the practice was to bestow the baccalaureate only on Spaniards. This was based on the belief that only they had the "purity of blood" (*limpieza de sangre*) necessary for the reception of an academic degree (Santiago, 1991, p. 138).

Hence, the above institutions discriminated against the members of other ethnic groups, including those of mixed heritage. Although the University of Santo Tomas began admitting students from other ethnic backgrounds (i.e. Mulatto, Japanese, Mestizo de Español) from 1674 onwards, Indios and Chinese Mestizos remained excluded. While Spaniards received scholarships from the government, foreign students, including local students from ethnic backgrounds other than Spaniards, had to pay fees. Higher learning in other areas, such as medicine, engineering, or law was unavailable on the islands. Those who wished to pursue these fields had to travel to Europe, particularly Spain, to obtain their degrees. One could say that these – the admission of fee-paying foreign students and mobility to Europe – were the first indications of internationalization in the Philippines (Santiago, 1991, pp. 138-139).

The mass uprisings of 1660-1661 in the provinces of Pampanga, Pangasinán, and Ilocos (mostly led by members of the *principalia* and alumni of Jesuit *primera enseñanza*) pressured

the colonial administration to lift the barriers to university education imposed on Indios and Mestizos. Consequently, the indigenous elites, particularly from the three provinces mentioned above, were granted access to higher education. In fact, they were among the first *principales* to enroll in the colleges in Manila. In 1686, King Charles II issued an edict "commanding colonial officials to carry out all the previous laws on public education under severe penalty if they failed to comply" (Santiago, 1991, p. 139). As a result, for example, the University of Sto. Tomas began accepting Indios and Mestizos de Sangley. Although the two were granted access, they were nevertheless ethnically non-Spaniards, thus had to pay fees and serve in the library, chapel, or study halls. They also had to wear half-length gowns (*capas*), in contrast to the full-length gowns worn by the Spanish students (Santiago, 1991, p. 139).[11] Since non-scholars also wore the capas, the gown also created a physical differentiation between the native and the Spaniard students, implying the natives' subordinate academic status. In 1697, King Charles II elevated the social status of all *indios* by declaring them of "pure blood" (Santiago, 1991, p. 139). This meant that the *principalia* or indigenous elites were comparable to the Castilian nobles, while the indigenous plebeians were equal to ordinary Spanish citizens (Santiago, 1991, p. 139). This declaration thus lifted the ethnicity-based barriers to university education. However, access to higher education remained exclusive to the elites who could pay the required fees.

Since the Spanish administrators on the islands viewed higher education with suspicion, they discouraged higher learning by labelling it as impious, by not providing adequate and quality training, or by giving preferential treatment to those trained in Spain or in other parts of Europe for public appointments (Alcala, 1999, p. 117). By the late 17th century, several Filipino intellectuals – the *ilustrados* – went to Europe in exile and pursued higher studies amidst suppression of press freedom in their home country. During this time, they became acquainted with nationalist and liberal ideas of the Enlightenment which inspired their own revolutionist aspirations (Anderson, 2013).

### 3.3.    U.S. American colonization

According to Constantino (2008), the U.S. Americans used the public school system as their "principal agent" in the "Americanization" of the Filipinos. Indeed, military power had to be supplemented with methods that would subdue the revolutionist spirits of the time. Military personnel thus became teachers and school supervisors, together with civilian volunteers recruited from the U.S.A. This, as Constantino argues, was the beginning of the miseducation of the Filipinos:

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[11] Hence the term *capistas* for non-Spanish students.

A quasi-American society was eventually established which bore the imprint of the institutions, values, and outlook of the colonizing power. The American colonial technique finally earned for the United States the loyalty of millions of Filipinos whose sense of values was distorted, whose children were miseducated, and whose tastes were conditioned to the consumption of American products. *It should be noted, however, that generally speaking the degree of loyalty, miseducation and Americanization was in direct proportion to economic and social status* (p. 308; my emphasis).

Referring to 'objective' historical accounts of the Philippine-American relationships, Constantino (2008) argues that their impact has been limited since the "the task of correcting historical misimpressions was not pursued as part of a total effort to remove the fetters on the Filipino mind that had been forged by colonial education" (p. 2). Indeed, the U.S. government used education as its key instrument to colonize the imaginaries of the Filipina/os (Justice, 2009). With its politics of Manifest Destiny, the McKinley administration declared its mission in the Philippines as an extension of its benevolent duty to educate and liberate the "atavistic" inhabitants of the islands (Coloma, 2009, p. 496; Justice, 2009). Under U.S. rule, Filipina/os were framed as racially black, that is, similar to the "ignoble, savage Africans." Filipina/os were thought of as at the bottom of the scale morally, mentally, and racially (Coloma, 2009, p. 503; Justice, 2009, p. 26). This argument justified the U.S. empire's benevolent mission of 'bringing education and liberation' by establishing the U.S. imperial school system on the islands. However, as Justice argues, the mission to educate was a pretext for invasion and military coercion (2009, p. 28).

The purview of "racial blackness" defined the curricula in public schools focused on training for manual labor and practical skills in occupations that were irrelevant to the economic needs of the islands (Monroe, 1925; Coloma, 2009; Justice, 2009). This design was patterned after the education of African Americans in the U.S. which Anderson (1988) labels as "education for servitude" in the U.S. economy. During the U.S. occupation, the public higher education system remained underdeveloped. However, this underdevelopment was intentional, since the U.S. colonizers did not see the Filipinas/os fit for higher intellectual pursuits. Acknowledging otherwise would have rendered the colonizer's pretext of Manifest Destiny pointless (cf. Justice, 2009, p. 26). Instead of expanding the public higher education sector, the U.S. colonial government sponsored select young Filipinas/os to study in universities in the U.S. through its scholarship program called the *pensionado system*. The basic requirement that only high school graduates could be accepted in the *pensionado system* "narrowed down the choice to sons and daughters of the well-to-do" (Constantino, 2008, p. 310). In fact, up until 1923, twenty

years after Act No. 74 establishing the public school system was implemented, high school graduates were still mainly from the upper and middle classes (Constantino, 2008, p. 310). Thus, the colonial administrators deliberately designed the scholarship program in such a way that it encouraged co-optation of the native elites by immersing them in American society and instilling U.S. American values and culture in them. This *pensionado system* became the precursor to labor migration of Filipina/o skilled and professional workers to the US, and other study-abroad programs through public and private scholarships. Upon their return to the Philippines, many of the *pensionado system* graduates became leaders in their respective fields and took up high-ranking positions both in public and private sectors. The program thus epitomized the benefits of (American) higher education: prestige, access to occupational mobility, social recognition, material rewards, and individual freedom (Eder, 2016, p. 457). As a consequence, the private higher education sector – both secular and religious – proliferated in the Philippines during the U.S. occupation. The increase in private higher education institutions was not suprising, given the rising demands for access to higher education and the strong belief in education as a leverage for social mobility and economic gains (Alcala 1999, p. 119; Monroe, 1925).

The U.S. occupation of the islands was also characterized by waves of migration to the U.S. and its Pacific territories, deepening the racialized, classed, and gendered division of labor which began under the Spanish administration. For much of the 20th century, Filipinos went to work as laborers on sugarcane and pineapple plantations in Hawaii, on farmlands in California, in canneries in Washington, Oregon, and Alaska, and in the metropoles in low-waged service employment such as waiters, busboys, or as household help between agricultural seasons (Asis, 2006; Lawless, 2004). Filipinos were also enlisted in the U.S. armed forces primarily to serve as stewards in the Navy, while Filipinas went to the U.S. as "war brides" (McNamara & Batalova, 2015). Filipino workers were subjected to discrimination and exploitation and work was organized by ethnic categories. In Hawaii, for instance, Europeans were managers of the plantations, the Japanese were the technicians, while the Filipinos occupied the lowest position and thus performed the "dirtiest jobs" (Bautista, 1998, p. 122).

## 3.4.  Higher education after independence

As the Philippines gained formal independence from the U.S. Americans, the scope and reach of the education system also grew in some measures. However, according to Orata (1956, p. 164), the high demand for education created a *compulsory education in reverse*, which means that the Filipino masses had compelled the government to provide schools for the children (my emphasis). The struggle for a nationwide and comprehensive provision of education was so great that many enterprising individuals and institutions took it upon themselves to establish

learning institutions. As a result, private education flourished despite concerns about the quality of education:

> And, while there is a problem in regard to the quality of education being given in many of these schools and also there is the problem of commercialization of private education going on in a great many of these schools, *still education is education and it is better to have some that may not be of the highest standard than not to have any at all* because the government is unable to provide all the facilities that may be needed for the education, especially higher education, of well qualified young people (Orata, 1956, p. 164, my emphasis)

This statement still rings true today, as private higher education institutions outnumber publicly-funded universities and colleges. The Philippine governments, past and present, have not been able to sufficiently provide for the massive demand for higher learning that exists up to the present. Moreover, the student's choice of institution is directly proportional to the financial resources available to him/her, a condition that has created education outcomes across society that are related to social and economic status. Those institutions for higher learning established during the colonial occupation are still considered to be the leading institutions in the country. Many of their alumni have become key leaders in the government and private sector, as well as high-profile leaders in the education sector. Religious groups, particularly Catholic religious orders, have also retained their leading roles in the country's private education system, from primary to secondary to tertiary levels. At the tertiary level, for example, QS Asia Ranking 2019 (www.qs.com) listed the following institutions in its ranking system: University of the Philippines (72); Ateneo de Manila University (115); De La Salle University (155; founded by the Catholic Brothers of the Christian Schools in 1911); University of Sto. Thomas (162); University of San Carlos (301-350; private Catholic university founded in 1867); Mapua University (401-450; founded in 1925 by former *pensionado* Don Tomas Mapúa, the first Filipino architect); Mindanao State University - Iligan Institute of Technology (451-500; a State University, originally founded in 1946); and Siliman University (451-500; established in 1901 by Presbyterian Mission from the United States).

### 3.4.1. Commission on Higher Education (CHEd)

To gain a sharpened understanding of the policy documents examined in this research, it is important to grasp the defining characteristics of the current higher education landscape in the Philippines, particularly the key agency that oversees it and its major stakeholders. The Higher Education Act of 1994, also known as the Republic Act 7722, established the CHEd as a part of the government's broader reform agenda that created a trifocal education system: the

Department of Education (DepEd) for basic education, the Technical Education and Skills Development Authority (TESDA) for vocational and technical education, and the Commission on Higher Education (CHEd, also referred to as the Commission) for higher education. The CHEd is also attached to the Office of the President, albeit for administrative purposes only. It views itself as the primary leader in the Philippine higher education system that works effectively with other major stakeholders in the sector. The CHEd's four basic mandates are to: [12]

- Promote relevant and quality higher education (that is on par with international standards and recognized in the international arena);
- Ensure that quality higher education is accessible to all, especially the poor;
- Guarantee and protect academic freedom, advance learning and research, develop responsible and effective leadership, educate high-level professionals, and enrich historical and cultural heritages:
- Commit to moral ascendancy by eradicating corrupt practices, institutionalizing transparency and accountability, and encouraging participatory governance in the Commission and the sub-sector (CHEd, 2017).

Although internationalization of the higher education sector is not explicitly expressed in the above mandates, the CHEd views this imperative in relation to its first mandate, that is in reference to relevant and quality outcomes of higher education. In its Strategic Plan 2011 – 2016, this is once again stressed in one of its objectives, which is to achieve international standards through quality improvements. The § 8 of R.A. 7722 (1994) details the powers and functions of the CHEd which can be summarized into two: regulation and development. As it is, the CHEd's mandates and scope of operation encompass the full spectrum of activities in the sector. In a nutshell, it is the government agency which has the official power and control over the higher education sector in the country. An exception to this full control is the Autonomous Region of Muslim Mindanao (ARMM). Executive Order (EO) No. 315 signed in 1996 devolved the CHEd's regulatory and supervisory functions over the HEIs and programs, including budget allocation for CHEd-supervised HEIs in the region to the Autonomous Regional Government of ARMM (Office of the President, 1996). As previously mentioned, there is also a continuing contention about autonomy between the CHEd and the local universities and colleges (LUCs) which were established and funded by their respective municipalities, not by the State.

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[12] The citation is from CHEd's Strategic Plan 2011 – 2016. The Japan International Cooperation Agency (2015) indicates that the CHEd has revised its vision and mission to suit the changing social and political contexts of the country. However, the new version is not publicly accessible on the CHEd's website.

Under the 1987 Constitution of the Republic of the Philippines, art. XIV on Education, Science and Technology, Arts, Culture and Sports, states that the Philippine State "shall protect and promote the right of all citizens to quality education at all levels, and shall take appropriate steps to make such education accessible to all" (Philippine Const. art. XIV, § 1). In higher education, this commitment is evident in the government's policy Republic Act No. 10931 which ensures access to quality tertiary education by providing free tuition and other school fees in publicly-funded higher education and vocational/technical institutions. Aside from ensuring access to affordable quality education to all its citizens, the State also guarantees advancement opportunities for advance high-level and mid-level professionals, ensures academic freedom of institutions, and promotes innovation and research. It also explicitly declares that state-funded institutions of higher learning are to focus their programs on the country's development plans at national, regional, or local levels (Philippine Const. art. II, § 17). In the Philippines, the development of the labor force and job-creation "whether at home or abroad" are one of the priority strategies in pursuing inclusive and sustainable growth and in decreasing poverty (www.neda.gov.ph). As the government agency mandated to oversee the higher education sector, the CHEd carries the task of ensuring that the above mix of missions and policies are also enacted. The CHEd's Board of Advisers includes the department secretaries of the Department of Education, Department of Science and Technology (DOST), Department of Trade and Industries (DTI), Department of Labor and Employment (DOLE); the Director-General of the National Economic and Development Authority (NEDA); the presidents of the Federation of Accrediting Associations of the Philippines (FAAP) and President of the Fund for Assistance to Private Education (FAPE); and two others when required. The composition of the CHEd's Board of Advisers indicates its close proximity to the employment sector (represented by DOLE and DTI) and to the developmental mandate of the government (through NEDA) (Rep. Act 7722, 1994, § 7).

### 3.4.2. Technical panels

R.A. 7722, § 12, also institutionalizes the function of technical panels for the various fields of study. These technical panels support the CHEd in setting program standards, in developing curriculum, as well as in monitoring and evaluating programs and HEIs (see also Di Gropello, Tan, & Tandon, 2010). The technical panels – usually from the academia, industry, and the Professional Regulations Commissions (PRC) through its 43 Regulatory Boards – review and approve the proposals against existing program standards and policies. The results of the review and recommendations from the technical panels become the basis for the CHED's implementation activities (p. 167). The Professional Regulatory Board (PRB), under the administration of the PRC, exercises administrative, quasi-legislative, and quasi-judicial powers over professions and performs control functions in licensure examinations, including

course content and administration. It also recommends measures necessary for advancement across the various professions. It monitors and evaluates HEIs, as well as monitors, administers, and issues permission to practice a profession (certificate of registration) including investigations of violations and enforcement of penalties (such as revocation of certificates) (Professional Regulation Commission, n.d.).

### 3.4.3. Higher education institutions

Diversity marks the higher education landscape in the Philippines, not only in terms of legal forms, sources of funding, or student body, but specifically in terms of size, quality, and scope of international activities of HEIs. The number of institutions alone is already a challenge for the CHEd to monitor and regulate. In the academic year 2017/2018, the country had 1,906 HEIs spread across the archipelago.[13] The breakdown of HEIs in the Philippines is as follows:

- Public HEIs: 233 (excluding Satellite Campuses)
    - 111 state universities and colleges or SUCs
    - 108 local universities and colleges or LUCs
    - 14 Other special institutions
- Private HEIs: 1,673
    - 350 Sectarian (owned and operated by religious organizations)
    - 1,323 Non-Sectarian (owned and operated by private entities that are not affiliated or linked to any religious groups)

Only 644, or 28.77%, of these institutions have accredited programs at various levels. Among the private institutions, only 65 are autonomous and 9 are deregulated. 77 public HEIs and 105 private HEIs have a Center of Excellence or Center of Development. This accounts for only 7.73% of HEIs.[14] The status Center of Excellence (COE) is a recognition given by the CHEd to departments within a HEI which regularly demonstrate excellence in the areas of instruction, research and publication, extension and linkages, and institutional qualifications. A Center of Development (COD) refers to a department with a high potential to become a COE. As of April 2019, only the University of the Philippines (UP) made it to the top 400 in the QS World Ranking, while 8 HEIs were listed in the top 500 in the QS Asia Ranking (www.qs.com). Geographically, public and private institutions are unequally distributed in the archipelago. There is a high density of HEIs in the National Capital Region as well as Regions III and IV (which are in close proximity to each other), while the Cordillera Administrative Region in Northern Luzon and Region XIII in Southern Philippines have the least number of HEIs.

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[13] Data as of June 2018 from www.ched.gov.ph, under the rubric Statistic.
[14] LUCs are not included in this data set.

In regard to the ratio of faculty with postgraduate degrees, 40.39% have masters' degrees and only 14.07% have terminal degrees (doctorate). Unfortunately, there is no data available on the specific number of faculty members with postgraduate degrees per institution. It would be interesting to know how many are engaged in private and public universities and in which disciplines. At any rate, many scholars who wrote on the state of quality of higher education in the country see these figures as a sign of deficiency (see for ex. Welch, 2011, Florida & Quinto, 2015).

### 3.4.4. Student body and mobility

Altogether, the sector enrolled 2,981,803 students in the academic year 2017/2018; 1,358,458 in public institutions, while 1,596,345 were enrolled in the private sector. This figure underlines the critical role that the private sector plays in providing opportunities for higher learning. On the other hand, it also emphasizes the enormous pressure put on public institutions' capacity to absorb students. As regards gender distribution in the same academic year, the number of female students is about 11% higher than the number of male students: 1,656,803 females vs. 1,325,000 males. In terms of distribution by study program, Business Administration, Education and Teacher Training, Engineering and Technology, Information Technology and Medical and Allied programs have consistently topped the list from 2007 to the present. In other words, these fields of study have regularly graduated the highest number of students in the last 12 years. Furthermore, 37,78% of all enrolled students chose STEAM (Science, Technology, Engineering, Agriculture, and Mathematics) programs as their field of study. Apart from gender distribution, there is little additional demographic information about the student body in the country. Information such as motivation for studying, socio-economic status, age-range, labor force participation, migration patterns, educational background of parents, etc. is unfortunately not available on the CHEd's website.

With reference to student mobility, it is a challenge for researchers to access accurate figures because different sources cite different numbers. Nevertheless, for the academic year 2017/2018, the UNESCO Institute of Statistics (2019) indicated that 16,257 Filipina/o students were on study programs abroad.[15] In the same year, there were 14,848 incoming international students whose visa was either converted or extended for the purpose of studying in undergraduate or graduate programs (Bureau of Immigration, 2018). This number does not include non-degree seeking international students, exchange students for one semester, or students on short-term programs such as study trips.

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[15] Data retrieved on 19.04.2019 from www.uis.unesco.org/en/uis-student-flow.

Table 1: Number of Filipina/o students abroad (AY 2017/2018)

Data aggregated from UNESCO Insititute for Statistics (2019).
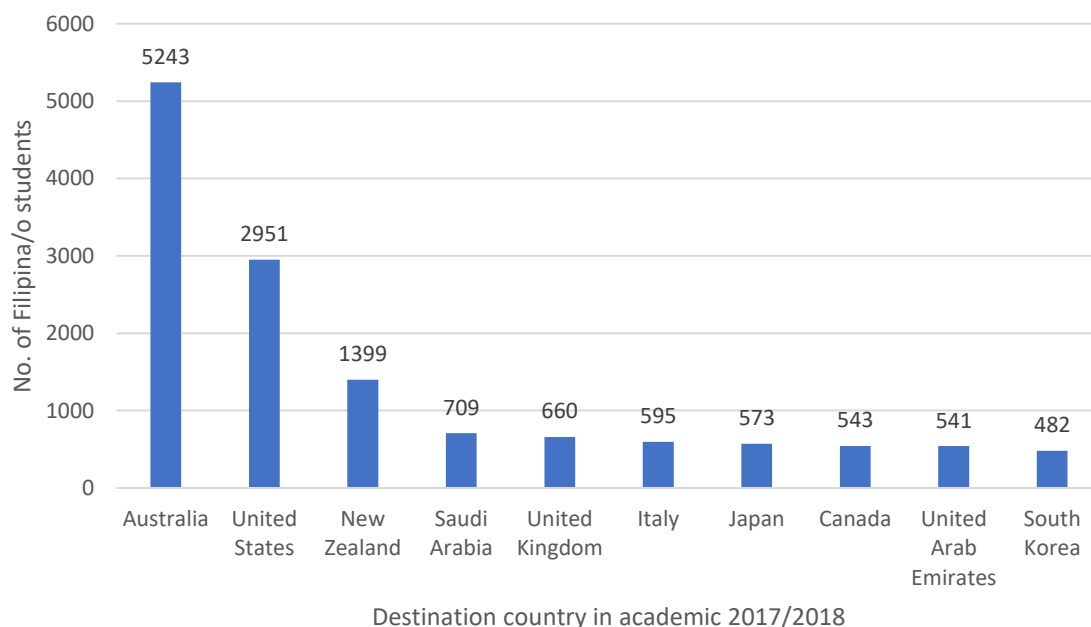


### 3.4.5. Private and public organizations

Aside from its Board of Advisers, the CHEd also works with other private and public entities. The list presented here is not exhaustive and only provides an idea of the numerous organizations that could have either a direct or indirect impact on higher education policies.

- Senate Committee on Education, Arts and Culture, Senate of the Philippine Republic
- House Committee on Basic Education, House of Representatives of the Philippine Republic
- House Committee on Higher and Technical Education, House of Representatives of the Philippine Republic
- Philippine Government Agencies
    - Department of Budget and Management
    - National Bureau of Investigation (NBI)
    - Department of Foreign Affairs (DFA)
    - Bureau of Immigration (BI)
    - National Intelligence Coordinating Agency (NICA)
    - National Economic and Development Authority (NEDA)
    - Department of Labor and Employment (DOLE)
    - Department of Science and Technology (DOST)
- Professional Regulations Commissions (PRC)

- Philippine Overseas Employment Administration (POEA)
- Philippine Association of Colleges and Universities (PACU)
- Philippine Association of State Universities and Colleges (PASUC)
- Association of Local Colleges and Universities (ALCU)
- Federation of Accrediting Agencies Philippines (FAAP)
  - Philippine Accrediting Association of Schools, Colleges and Universities (PAASCU)
  - Philippine Association of Colleges & Universities Commission on Accreditation (PACUCOA)
  - Association of Christian Schools, Colleges & Universities Accrediting Agency, Inc. (ACSCU-AAI)
- National Network of Quality Accrediting Agencies (NNQAA)
  - Accrediting Agency of Chartered Colleges & Universities of the Philippines (AACCUP)
  - Association of Local Colleges & Universities Commission on Accreditation (ALCUCOA)
- Coordinating Council of Private Educational Associations (COCOPEA)
  - Philippine Association of Colleges and Universities (PACU)
  - Catholic Educational Association of the Philippines (CEAP)
  - Association of Christian Schools, Colleges and Universities (ACSCU)
  - Philippine Association of Private Schools, Colleges and Universities (PAPSCU)
  - Association of the Philippine Private Technology-Based Institutions (APPTI)

### 3.4.6. Regional and international bilateral agreements

The Philippine government has signed several bilateral agreements to initiate the country's internationalization and to provide an impetus for selected HEIs to actively participate in the process. To illustrate, some key agreements are listed here:

- United Kingdom – the collaboration with the UK is a key strategy for the sector's internationalization (CHEd PR, 2019a). It covers provision of scholarships for Filipinos (i.e. the UK Chevening Scholarship, Newton Agham) and joint postgraduate degrees in ten niche subjects or disciplines between selected HEIs in both countries.
- Canada – scholarships in collaboration with the Canadian Bureau for International Education for graduate studies and training programs on institutional internationalization, second career education, and community college best practices in Canada designed for faculty and non-teaching staff. These scholarships are aimed at

supporting the transition of faculty and staff affected by the K-12 reform (CHEd PR, 2017e).

- Australia – scholarships in selected disciplines for postgraduate studies at the Royal Melbourne Institute of Technology and Macquarie University; also through the Australia Awards Scholarships. Australia's development cooperation with the Philippines has become one of Australia's largest aid programs. It is a major donor country in basic education including technical support for the K-12 reform (Australian Embassy, 2016).

- France – through the PhilFrance scholarship for postgraduate studies; also with SciencesPo in politics, social policy and administration, and urban studies (CHEd PR, 2017c).

- United States – through the Fulbright Scholarship for graduate degrees, intended for faculty development in fields such as Socio-Cultural Anthropology, Agricultural Education, Fisheries Technology, and Maritime Law and Policy. In addition, the Philippine California Advanced Research Institute (PCARI) aims to develop the skills and expertise of Philippine HEIs' faculty and staff through collaborative research, scholarships, and training with leading research universities in California in the areas of information infrastructure and health (CHEd PR, 2019d).

In addition to these bilateral agreements, the ASEAN as a regional bloc and its affiliated institutions are one of the key stakeholders and policy influencers in the internationalization of the Philippine higher education sector. Activities cover various areas, such as mobility of persons, partnerships, networking, joint research and publications, development and implementation of qualification reference frameworks, quality assurance, and activities that promote an ASEAN identity. The CHEd also signed bilateral agreements with other countries to signal its commitment to internationalization.

## 4. Research design

My focal points in defining the overall research design are my research goals, research questions, and the nature of the phenomenon I want to study (see Flick, 2007). In keeping with this, I chose an integrative approach for my research: I primarily employed a qualitative research strategy and complemented it with quantitative strategies to support my arguments. Owing to this approach, I had to clarify conceptual and methodological concerns while planning for the research process. My epistemological framework is primarily based on Critical Discourse Studies, specifically the Discourse-Historical Approach. Figure 3 below summarizes the overall strategy and design chosen for this research.

Figure 3: Overall research strategy and design

**Research Strategy**
- Qualitative approach

**Orientation to Theory**
- Inductive

**Epistemological Position**
- Interpretivism (Verstehen)

**Ontological Position**
- Social Constructionism

**Research Design**
- Case Study

**Research Method**
- Discourse Historical Approach (DHA)

**Research Data**
- Documents in the field of political actions

### 4.1. The qualitative paradigm

I align my research with the qualitative approach because my research questions are explorative in nature and the qualitative design allows the flexibility necessary to address such explorative questions during the research process. The starting point for a qualitative inquiry, and thus for a qualitative analysis, is to discover how humans come to terms with their social world and to understand the meaning of their social behavior within the contexts in which that social reality exists (Boeije, 2010, pp. 12-13). Qualitative research uses flexible methods to collect rich data and to allow researchers to interact with the study participants in their social environments. As Martínez-Alemán, Pusser and Bensimon (2015) succinctly put it:

> The researcher's account of higher education phenomena […] is by nature interpretative [….] We consequently make meaning of phenomena through methodological norms that regulate our view of actors, their relations to the world, and the benefits and costs of their actions (pp. 1-2).

I take the epistemological position of interpretivism as influenced by the philosophical traditions of Weber's *Verstehen*, Schutz's phenomenology, and Blumer's *symbolic interactionism* (Bryman, 2012, pp. 29-32). Interpretivism follows the logic of hermeneutics which is "concerned with the theory and method of the interpretation of human action" and thus requires social scientists to grasp the meaning "from the perspective of the social actors" (Bryman, 2012, p. 712). I concur with Bryman (2012) who explains that interpretative process creates layers of interpretation because the meaning given to the social behavior being studied needs to be placed within social scientific frames, concepts, theories, and literature in the discipline (p. 31). Ontologically, qualitative studies can take the constructionism position. Constructionism is based on the idea that social phenomenon is actively constructed by social actors in, and through interaction with, the social environment. This implies that social categories "do not have built-in essences" and are hence in a state of constant flux and revision (p. 34). As Saldaña (2016) suggests, qualitative research requires careful attention to language and reflexive analysis of emergent patterns that provide meaning to human experience, including the researcher's own experiences, interpretation, and cognitive schemes (p. 10).

### 4.1.1. Social constructionism

Related to the interpretivist research approach is the concept of *social constructionism*. Both constructionism and interpretivism are concerned with examining the process of creation, negotiation, sustenance, and modification of meanings. The focus is on understanding the meaning of a social phenomenon from the perspectives of those who have experienced it (Andrews, 2012, p. 40). For constructionists, although knowledge and truth are created or constructed, they correspond to something real in the world; reality is socially defined, but this reality is embedded in the subjective, lived experiences of everyday life, and how the world is socially understood (Andrews, 2012, p. 40). This is consistent with the ideas of Berger and Luckmann (1966) who, in their influential work *The Social Construction of Reality*, stress that social environments can only exist through collective action (p. 51). Thus, the social order is created through social interaction and is therefore a human product both in its origin and essence (also Eder, 2011). Human beings also 'objectify' their social environment through *institutionalization* constituted by two distinct but related processes – routinization and habitualization – that cast repetitive actions into a pattern to economize effort and give room for innovation. Habitualized actions have a stabilizing effect as they become established and

embedded in daily activities as routines, forming a general body of knowledge or conceptual repertoire. It encompasses both the actions and the actors or agents themselves and is thus shared by, and available to, members of the society. Institutionalization is the 'typification' of the habitualized actions by agents or actors (Berger & Luckmann, 1966, p. 52). This means that through institutionalization of social practices and knowledge, future generations experience them as objective (Andrews, 2012, p. 40). Society, from this perspective, exists both as a subjective and an objective reality. Therefore, the research agenda is to understand and examine the collective constructions of meaning and knowledge shaped by conventions of language and other social processes (Schwandt, 1998, p. 240). Language is of central concern as the means of transmitting concepts, thoughts, and feelings; hence the focus of examination is how language structures the social experience.

Social constructionism, as invoked in this research, takes the middle position that there is an observable reality (event, experience, or phenomenon) but with multiple possibilities for interpretation. To this degree, social constructionism is consistent with realism. As discussed earlier, social reality is both objective and subjective. It is socially constructed and therefore subjective; at the same time, it is objective because individuals impose and attribute meanings to it. Social reality is shared and the meanings attributed to an experience (i.e. social institutions) determine how and what is perceived to be 'real' (Eder, 2011, p. 29). As Berger and Luckmann (1966) state: "Society is a human product. Society is an objective reality. Man is a social product" (p. 60). Any examinations of the social world must consider the dialectical relationship between these dimensions. Social constructionism, according to Andrews (2012), does not concern itself with the nature of knowledge, but with how that knowledge is constructed.

### 4.1.2. Critical inquiry

Critical inquiry focuses on analyses of inequities at micro, meso, and macro levels of social practices. It examines how language constructs reality and semiotics, or the interpretation of signs and symbols. In both cases, language takes a central role in the construction and interpretation of the social world. Critical inquiry presumes that unequal power relations in a society are produced and reproduced through cultural, social, and economic systems. Hence, it claims an "emancipatory epistemology" that fosters democratic principles and values (Martínez-Alemán, 2015, p. 7). Originating from the traditions of the Frankfurt School, critical inquiry combines theory (or philosophical thinking) with practical application; thus, it seeks to unpack social problems through an interdisciplinary approach to social inquiry to transform unjust social conditions (Martínez-Alemán et al., 2015, p. 8; Wodak, 2001a, p. 9). It is grounded in the lived experience, on subjectivity, and agency of the actors under study. Hence, agency

is crucial in the analysis as it provides "a historical snapshot of subjectivity that gives texture to phenomena and their effects" (Martínez-Alemán et al., 2015, p. 3). Researchers, on the other hand, must also confront their own subjectivity; it is essential that they reflect and acknowledge their own social conditioning which frames the decisions they make during the research process (Martínez-Alemán et al., 2015, p. 3; Wodak, 2001a, p. 9).

## 4.2.   Critical Discourse Studies[16]

Critical discourse studies, or CDS, is a problem-oriented and multidisciplinary approach to the study of social problems and political issues. In general, CDS aims to critically examine those layers of meaning to expose the ideas and ideologies that underlie discourse structures, and consequently, their impacts on people's subjective positions (Van Dijk, 2015, p. 467; Fairclough, 2013, p. 178; Wodak & Meyer, 2016, pp. 2-3). CDS thus argues that language in various forms (i.e. text, talk, and images) within defined contexts conveys a specific meaning, a version of reality that can marginalize and oppress groups of people in a society, while rendering other groups more powerful (Wodak, 2001a, p. 2). CDS approaches are hence interested in "deconstructing ideologies and power through the systematic and retroductable investigation of semiotic data (written, spoken or visual)" (Wodak & Meyer, 2016, p. 4) that are widely and publicly circulated, such as policy texts, government documents, or political speeches (Wodak, 2001a, pp. 2-3; Van Dijk, 2016, p. 63). It also seeks to examines acts of resistance, or the ways that actors break hegemonic and dominant discourses (Wodak, 2001a, p. 10). Crucial to CDS scholars is the explicit awareness of their political or social advocacy agenda in determining their research questions and objects of investigation, while maintaining their scientific methodologies and remaining self-reflective over their research process (Wodak & Meyer, 2016, p. 4). According to van Dijk (2015, p. 467, following Fairclough and Wodak, 1997, pp. 271-80), the basic tenets of CDS are as follows:

- CDS addresses social problems
- Power relations are discursive
- Discourse constitutes society and culture
- Discourse does ideological work
- Discourse is historical
- The link between text and society is mediated
- Discourse analysis is interpretative and explanatory
- Discourse is a form of social action

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[16] The original network of scholars – T. van Dijk, N. Fairclough, G. Kress, T. van Leeuwen and R. Wodak – used the term critical discourse analysis in the 1990s and 2000s to refer to their common research perspective. From 2013 onwards, van Dijk (2013, 2015) as well as Wodak and Meyer (2016) emphasize their preference for the collective term critical discourse studies or CDS to signify the diversity of theoretical bases, methods, and approaches to the critical study of discourse.

Generally, CDS scholars use the hermeneutic process – or the hermeneutic circle – as a method of understanding and creating meaning relations between and in texts. Consequently, there are several concepts that are fundamental and indispensable to CDS: critique, history, power, ideology, text, and discourse (cf. Wodak, 2001a, p. 3). These terminologies are polysemous and ambiguous, hence, how they are understood in CDS must be clarified. More importantly, CDS also pays attention to what is *not* articulated, what is *missing* or *implied* because this is equally significant for the analysis.

### 4.2.1. Critical theory

Critical theory, as opposed to traditional (positivist) theory, is a critique of the unequal structures that brace a society, and aims to stimulate change from within to emancipate the oppressed from the sufferings condoned by the structures (Berendzen, 2017, sec. 3, para. 2). To achieve emancipation, Horkheimer suggested an interdisciplinary approach to research "knit together within a more comprehensive framework that takes society and its improvement as its object," in contrast to research that is compartmentalized only within a specific field (sec. 2.3, para. 4). Breeze (2011), on the other hand, contends that there is no particular direct link between CDS and the Frankfurt School, save for the discourse-historical approach developed by Wodak and the Marxist perspective on late capitalism which CDS scholars shared with Frankfurt School theorists (p. 496). Furthermore, the general "critical turn" in the social sciences in the 1960s and 70s and the ideas of specific authors (e.g. Gramsci's notion of internalized hegemony; Bourdieu's habitus, language, and symbolic capital; Habermas' communication theory) heavily influenced the emergence of CDS, albeit the scope of influence is limited to the theory of ideology and of society (p. 497). CDS also took inspiration from Foucault's concept of discourse which stresses the centrality of language in configuring social relations (p. 497).

### 4.2.2. Critique

Jessop and Sum (2016) describe critique in terms of modes or ways of operation. This mode of critique is "a critical attitude of the mind that goes beyond assessing the empirical validity of factual analysis or the technical-instrumental practicality of specific social arrangements." (p. 105). On a similar note, van Dijk (2013) states that being critical is a state of mind or an attitude, "a way of dissenting [....] against the symbolic power elites that dominate public discourse, especially in politics, the media and education" (para. 1). Critique thus refers to examination, evaluation, assessment, valuation, and judgement from a normative perspective. The focal point of critique could be a person, an object, an institution, or a structure (Wodak & Reisigl, 2016, p. 24).

Hammersley (1997) construes 'critical' as "an abandonment of any restraint on evaluation of the texts and contexts that are studied" (p. 238). One of the basic problems of CDS, according to Hammersley, is precisely its critical nature which points to a lack of measures of values. Since 'to critique' is to level unrestrained judgement and evaluation on something (social structures in the case of CDS), on which terms should the judgement and evaluation be carried out? What are the criteria for evaluation? How could they be empirically measured? These basic questions have crucial implications to the practice of CDS and point to its very philosophical foundations and explicit political goals. Consequently, these questions also underline the perceived incompatibility of CDS with scientific research.

Rajagopalan (2004) contends, that if to be 'critical' means to be partisan and to be 'scientific' means to be neutral or value-free, then it would be futile to establish CDS as a legitimate academic enterprise as intensional semantics forecloses the two from cohabiting the same logical space (p. 261). Kincaid, Dupré, and Wylie (2007) discuss the historical roots of this debate which can be traced to the beginning of Western philosophy. They indicate that the claims of value-free science are tied to the differentiation made between facts and values, and the resulting attitude towards morality and values. From Hume (moral and value claims are neither truths of reason nor truths of facts) to Kant (morality as a synthetic a priori kind of truth) to the logical positivism movement (moral judgement as an expression of emotion), scientists have viewed value judgements as "subjective and unamenable to rational argumentation" and are thus "fundamentally different than factual statements" (p. 5). However, such claims of value-freedom in science have been questioned. Archer et al. (2016), for example, state that "there are no truth values or criteria of rationality that exist outside of historical time" (para. 9). This underlines the context-boundedness of rationality, or the fact that all representations and perspectives are limited and situated. The authors further argue that, in as much as facts are value-laden, values are also fact-laden. Values have factual elements grounded in specific ontological assumptions about the nature of the social world (para. 13). Thus, value-neutrality is an impossible requirement in scientific activities (Rajagopalan, 2004). Kincaid et al. (2007) sharpened the discussion to raise the following questions: what kinds of values are at work, how are they involved (or employed) in science, and what are their impacts and ramifications?

Rajagopalan (2004) also provides an explanation for the enterprise of critique in CDS by arguing that human language is not a natural object, but a human creation, and, as such, it entails inalienable ethical-political dimensions that need to be challenged (p. 261). Unlike the traditional view of limiting research to providing a more accurate description of the status quo, CDS stresses the need to explain why and how social structures maintain the status quo (Rajagopalan, 2004, p. 262). Thus, being critical means a "radical questioning of what the

enterprise of science is all about" and to go beyond determining the facts or truths of an established order (pp. 262-263). It necessitates examining the power relations that sustain and calcify that very order "from the point of view of an ideal standard or alternative," to providing a diagnosis of problems and contradictions as well as suggestions for corrective action in favor of those who have been left-out or discriminated against (Wodak & Reisigl, 2016, p. 24; Rajagopalan, 2004, p. 263). Such judgement, then, requires contextual knowledge of the discourse. This also has consequences in terms of the data. As explained by Wodak and Reisigl (2016), data needs to be embedded within a social context and the positions of participants in the discourse should be clarified, while the researcher himself/herself engages in a continuous self-reflection during the entire research process.

### 4.2.3. History

One basic and crucial assumption in CDS is the historicity of discourses. This denotes that "all discourses are historical" or bear historical actuality and therefore need to be understood within their specific contexts. It explicitly acknowledges the influence of extralinguistic factors (such as culture, society, and ideology) and components (i.e. psychological, sociological, political, and the like) in discourses. Thus, CDS is open to a broad range of factors that influence it (Meyer, 2001, p. 15). In his studies on the acts of meaning, Halliday (2009) identifies four dimensions of history that are relevant in semiotics. These are: the intertextual, the developmental, the systemic, and the intratextual (p. 4). These dimensions enable sentences to become acts of meaning. "Every act of meaning has a context of situation, an environment within which it is performed and interpreted" (Halliday, 2009, pp. 1-2). For communication to occur, it is necessary for those taking part in the communication process to be able to make informed guesses about the meanings that are likely to be exchanged. Thus, the interlocutors base their interpretation on the semiotic structure of the communicative situation (Halliday, 2009, pp. 1-2).

### 4.2.4. Discourse

Discourse within the CDS framework is defined as language used in speech and writing as a form of social practice (Wodak & Meyer, 2016). In policy research, discourse encompasses a broad set of concepts and ideas that impact argumentation and deliberation; it defines the range of possibilities with which people experience their world and which views about the world are legitimate and not (Fischer & Gottweiss, 2012, p. 10; Bryman, 2012). Language is an instrument of power; it signals power, expresses power, but also challenges power. It provides the means for articulating differences in power within social structures. Language is thus embedded in social process permeated by power relations. For CDA, language is not powerful by nature or on its own, but it gains power through the language usage of people whose power

depends on the position they occupy within the social structures (Wodak, 2001a, p. 10). As Halliday (2009) remarks:

> The power of language is vested in the act of meaning […] the full creative power of an act of meaning arises from the fact that language *both construes and enacts*. It is not only a way of thinking about the world; it is also, at one and the same time, a way of acting on the world – which means, of course, acting on the other people in it [….] (p. 4; my emphasis).

For example, texts, such as policies, are usually created and produced through negotiation, conflicts, struggles and contentions between agents, and between ideological positions competing for dominance; thus "they are governed by differences in power which are themselves encoded in and determined by discourse and by genre" (Halliday, 2009, p. 11). Manipulations and control of power are not only evident through linguistic expressions and grammatical forms in a text, but also by means of the genre of the text linked to social events or occasions (p. 11). According to Reisigl and Wodak (2016), there are three constitutive elements of a discourse: macro-topic relatedness, plurality of perspectives, and argumentativity. A discourse is thus considered to be (p. 27):

- a cluster of context-dependent semiotic practices situated within fields of social action;
- socially constituted and socially constitutive, hence there is a plurality of perspectives;
- related to a macro-topic that intertextually links the discourse units into various discourse topics, sub-topics, argumentation schemes, etc. (also Reisigl, 2017, p. 69)
- linked to argumentation about validity claims, such as truth and normative validity involving several social actors with different points of view (Reisigl & Wodak, 2016, p. 27).

From the above, discourse can be understood as a dynamic semiotic that is open to (re)interpretation that depends on the perspectives of the analysts (Reisigl & Wodak, 2016, p. 27). Regarding macro-topic relatedness, it is necessary for the analyst to be able to delimit the discourse topics from others, despite the fluid and porous nature of discourses. This means recognizing not only the linkages between discourses, but also the boundaries of the discourse.
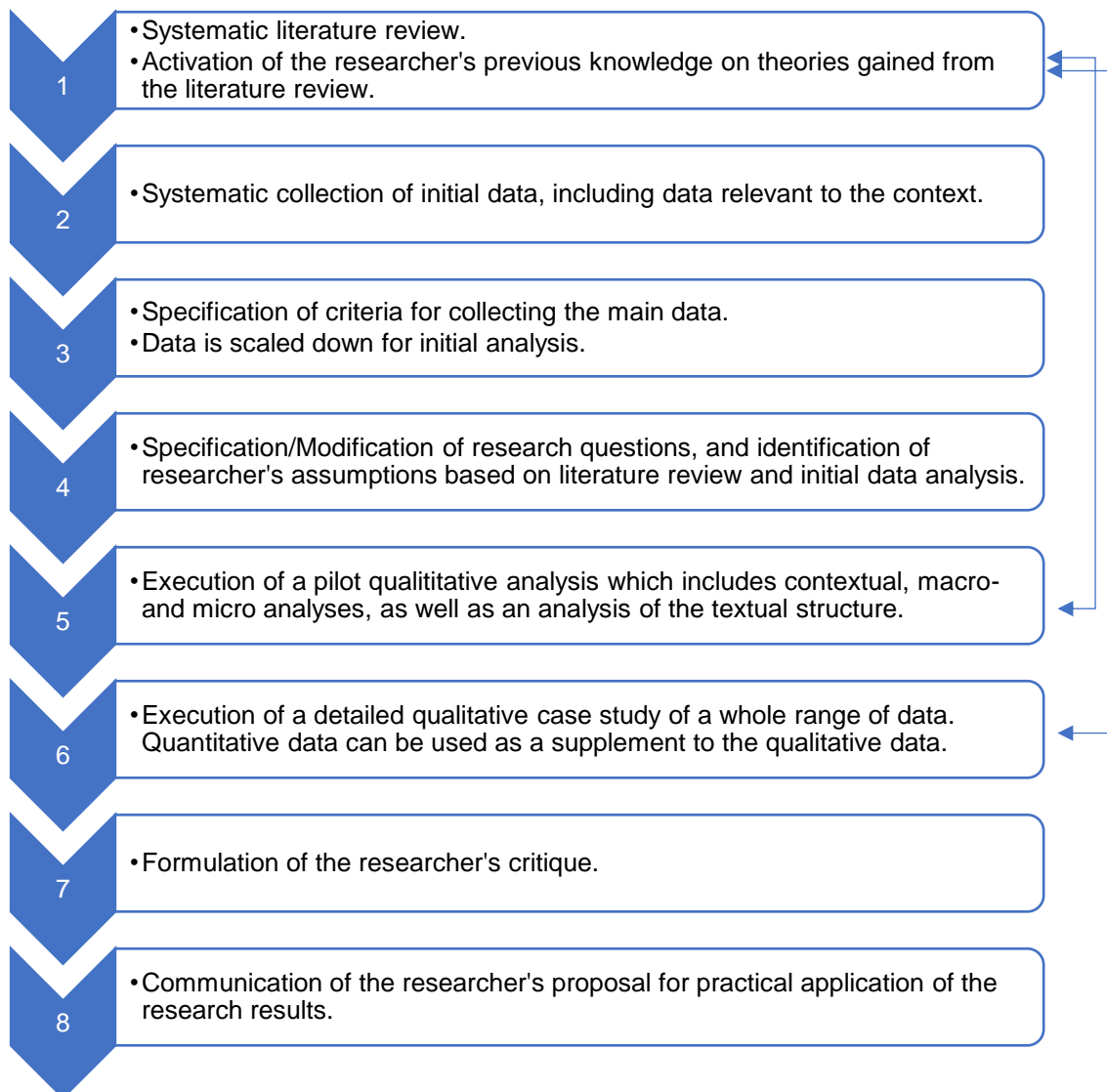
## 4.3.    Discourse-Historical Approach

As the label suggests, the Discourse Historical Approach puts weight on historical anchoring, on examining the linkage between historical context and the discourse or discursive events. DHA developed from the studies of the Viennese Critical Discourse Analysis which reconstructed the constitution of anti-Semitic stereotypes that emerged in (semi)public

discourses in the second half of 1980s in Austria, particularly in Kurt Waldheim's presidential campaign and in the commemoration of the 50th anniversary of Austria's integration into the Third Reich (Reisigl, 2018, pp. 44-45). Throughout the years, DHA has focused on the relationships between discourse, history, politics/policy, identity, race/racial discriminations, language in social institutions, organizational communication, ecology, and media communication, extending its focus from Austria to Europe and at different levels in the global community. Depending on the resources vailable to the researcher, Reisigl and Wodak (2016) suggests going through an 8-step recursive research process that also integrates the principles of DHA. The recursive process requires the researcher to move back and forth several times between theory and empirical data. Figure 4 illustrates this. In regards to the process, the DHA as an empirical framework for methodology is characteristically qualitative and is thus similar to other methodologies in qualitative approach, such as Grounded Theory, General Qualitative Study, or Netnography. The principles of DHA are the following (Reisigl & Wodak, 2016, pp. 31-32):

- DHA employs interdisciplinary approaches to theory, methods, and methodology.
- It is problem-oriented, particularly in regards to social and political problems.
- The research process in DHA is recursive (see Figure 4).
- It examines numerous genres, fields of action, and public spaces. It also examines the relationships between interdiscursivity and intertextuality.
- DHA includes history in the interpretation of data.
- It elaborates categories and methods for each analysis.
- It prefers 'middle-range theories' as a theoretical basis.
- It communicates its research results to the public as well as propose application of the result by experts.

As such, DHA is more than language analysis; it is a multidimensional, transdisciplinary research practice that aims to yield concrete social applications (Reisigl, 2018, p. 48). It also shares fundamental characteristics with other variants of CDS. However, it is unique in its orientation to CDS' three basic concepts, namely: critique, ideology, and power, which are constitutive concepts of DHA. In DHA, strategy refers to "a more or less intentional plan of practice (including discursive practice)" adopted by agents or actors to achieve a particular social, political, psychological, or linguistic goal. "Discursive strategies are located at different levels of linguistic organization and complexity" (Reisigl & Wodak, 2016, p. 33).

Figure 4:  8-Step recursive process of DHA

Based on Reisigl and Wodak (2016, p. 34)

| | |
|---|---|
| 1 | • Systematic literature review.<br>• Activation of the researcher's previous knowledge on theories gained from the literature review. |
| 2 | • Systematic collection of initial data, including data relevant to the context. |
| 3 | • Specification of criteria for collecting the main data.<br>• Data is scaled down for initial analysis. |
| 4 | • Specification/Modification of research questions, and identification of researcher's assumptions based on literature review and initial data analysis. |
| 5 | • Execution of a pilot qualititative analysis which includes contextual, macro- and micro analyses, as well as an analysis of the textual structure. |
| 6 | • Execution of a detailed qualitative case study of a whole range of data. Quantitative data can be used as a supplement to the qualitative data. |
| 7 | • Formulation of the researcher's critique. |
| 8 | • Communication of the researcher's proposal for practical application of the research results. |

### 4.3.1.  Critique

DHA follows the Critical Theory's socio-philosophical orientation of social critique. Social critique in this tradition has three related aspects: text or discourse immanent critique, socio-diagnostic critique, and prospective critique (Reisigl & Wodak, 2016). The text or discourse immanent critique examines inconsistencies in the internal structures of the text and discourse (pp. 25-26). The socio-diagnostic critique aims to uncover the characteristics of discursive practices, particularly latent ones that are persuasive and manipulative. For this, it is an imperative that the researcher has a contextual knowledge of the subject being studied. This type of critique draws the analysis and interpretation of discursive events from social theories

and other theoretical models (p. 26). Prospective critique "seeks to improve communication" by providing suggestions for solving social and/or political problems (p. 25).

### 4.3.2. Ideology

Van Dijk (2006) defines ideology as a socially shared mental representation or basic common beliefs of a social group (pp. 116-117). DHA examines how linguistic and other semiotic practices mediate and (re)produce ideologies in social institutions. It aims to deconstruct the hegemony of a discourse by deciphering and examining the underlying ideologies that serve not only to establish or reify, but also to resist, dominance (Reisigl & Wodak, 2016, p. 25).

### 4.3.3. Power

Power can be productive or destructive. It can limit and regulate the discourse through various mechanisms. Hence, power materializes in the discourse through linguistic and grammatical forms by controlling the discursive events or social occasions, by defining the genre of the text, or by regulating who has access to the specific spheres (Reisigl & Wodak, 2016, p. 26).

### 4.3.4. Text and genre

DHA also distinguishes between text and context. A text represents the production and reception of speech acts. Hence, it makes linguistic actions tangible and durable. In its varied forms (visual, written, oral), a text is the material or physical representation of a discourse; it bridges discursive events and the historical formations of discourse strands. As such, it is part of a discourse and can be assigned to a genre. Genre is a "socially conventionalized type and pattern of communication that fulfills a specific social purpose in a specific social context" (Reisigl & Wodak, 2016, p. 27). Because it is based on social convention, genre also shapes the content and purpose of the discourse. According to Biber (2012, p. 193), genre features do not occur frequently in a text, but often emerge either at the beginning or ending. They are bound by conventional expectations of particular types of text constructions.

> Genre features are often conventional rather than functional. That is, genre features conform to the social expectations of how a text of a particular type should be constructed, rather than having clear functional associations with the situational context (Biber, 2012, p. 193).

Discourse is achieved through text and genre (Reisigl & Wodak, 2016, p. 27). Genre signifies an aspect of the relationship between form and function of language (Schaenen, 2010, p. 35). In other words, it signals the purposes of language in a communicative event or social activity in relation to the form (speech, text, multimodal) of the communicative acts. DHA also

recognizes three key dimensions of textual meanings and structures (Wodak, 2018, pp. 9-10): the topics, the discursive strategies employed, and the linguistic means that serve as sources for the first two (e.g. argumentative strategies, topoi, presupposition). DHA considers four layers of context: "the intertextual and interdiscursive relationships between utterances, texts, genres and discourses;" aspects such as extra-linguistic social/sociological variables; the historical formation of texts and organizations; and the institutional frames of the specific context of a situation, event or episode being examined (Wodak, 2018, p. 10). Through the structure of a text of a specific genre, it is possible to determine how a discourse through a set of discourse topics manifests in practice; or how a discourse becomes embedded in the social practices of a particular field of action. This also underlines the function of the textual structure as the starting point in deconstructing a discursive practice. DHA examines three dimensions. Firstly, the contents or topics of a specific discourse are identified. Secondly, the discursive strategies employed are analyzed. Thirdly, the linguistic means (as types) and context-dependent linguistic realization (as tokens) are investigated (Reisigl & Wodak, 2016, p. 32). As regards discursive strategies, Reisigl and Wodak (2016, p. 29) identify five basic schemes for analysis: nomination, predication, argumentation, perspectivization, and mitigation/intensification. In this study, I focus on the argumentation schemes which justifies or questions claims of truth and normative rightness (Wodak, 2016, p. 5; Lin, 2014, p. 217). In particular, I examine the key topoi employed in the data and how these argumentations structure the policy discourse on IHE in the Philippines. Zompetti (2006) argues that topoi are not only useful for locating hidden premises in an argument, but it very useful in constructing arguments (p. 19).

## 4.4.    Argumentation schemes

Reisigl (2017) notes that argumentation schemes have varying purposes. Correspondingly, they can be analyzed from various perspectives. Following Reisigl (2017, pp. 74-79), I discuss in this section the functional, formal, and content-related analyses of argumentation.

### 4.4.1.  Functional analysis

Toulmin's works serve as the basis for the functional analysis of argumentation. Also called the Toulmin Model, it has six basic elements (Toulmin, 2003, pp. 89-100; Reisigl, 2017, pp. 74-75):

- Claim (C) – assertion/statement/thesis in question that needs to be proven or justified;
- Data (D) – evidence or facts used to prove and support the claim;

- Warrant/Conclusion Rule (CR) – the hypothetical argumentation scheme or chain of reasoning that connects or links the claim to the data, or the topos (argumentation that leads from the data to the claim);

- Rebuttal (R) – counterarguments or statements that address potential objections to the warrant; it also indicates the circumstances under which it is not possible to use the connection or linkage (warrant or conclusion rule) between claim and data;

- Backing (B) – statement(s) that support the legitimacy of the warrant/conclusion rule; it informs why the warrant or conclusion rule is rational;

- Modality/Qualifier (M) – specificities and nuances based on the data and the warrant that indicate the strength of the claim.

### 4.4.2. Formal analysis of argumentation

According to Kienpointner (1996), Toulmin's model can be simplified into three basic elements: arguments – conclusion rule – claim. These can be explicit or implicit in an argumentation (Reisigl, 2017, p. 75). The formal analysis is based on the simplified model or reduced functional model illustrated here. This means that the formal analysis of the argumentation follows as a syllogism (Reisigl, 2017, p. 75). In this model, the warrant or conclusion rule is the central element, as it connects the argument to the claim. Reisigl (2017) explains that the conclusion rule is an argumentation scheme also known as *topos* (Greek for place) or *locus* (Latin for place) that justifies the transition from the argument to the claim (or conclusion) (p. 25; italics in original). It belongs to the premise, or the ideas and theories that build the basis of a statement or an action. However, topoi are not always indicated explicitly. They need to be expressed as causal or conditional paraphrases, for example: 'if x, then y' or 'y because of x' (Reisigl, 2017, p. 75). In his works on argumentation and logic, Kienpointner (1996) identifies nine patterns or schemes of daily argumentation. They are definition, species/genus, comparison, cause/consequences and intention, contradiction, authority, example, and analogy. These schemes, or topoi, can be formalized by examining the warrants or conclusion rules and how these are connected to the argument(s) and the claim(s). For example, the scheme, or topos, of comparison can be formalized as follows:

Conclusion Rule (CR): If A and B are similar (or different) with respect to X, they have to be treated similarly (or differently) with respect to X.
Argument (A): A and B are similar (or different) with respect to X.
Claim (C): Thus, A and B have to be treated similarly (or differently) with respect to X.

Grue (2009) argues that an analysis purely based on the functional model is insufficient for DHA because the deductive approach used in the functional model does not consider contextual background (pp. 289-290).

### 4.4.3. Content-related analysis of argumentation

The Content-Related Analysis of Argumentation approach formalizes recurring content-related warrant or conclusion rules specific to a particular field, discipline, social action, theory, etc. In contrast to a purely functional analysis of argumentation, content-related analysis follows the view that argumentation is always topic-related and field-dependent (Reisigl, 2017, p. 77). This means that the concept of topoi is dynamic; it can be understood both as abstract, general conclusion rules (in the sense of functional analysis) and as content-related argumentation schemes drawn from the conclusions that are derived from the contents of the material (empirical data) being examined (see also Rapp, 2010). Thus, the topos (topoi in plural) is both a justification for a line of argument embedded in doxa or common knowledge (and thus requires less justification) and a rule of inference tied to concepts, not words (and thus can be potentially interpreted in different ways) (Grue, 2009, p. 289). This approach provides more information on specific characteristics of discourses (such as ideologies or justification strategies) than a purely functional analysis (p. 77).

In his analysis of *Aristotle's Rhetoric*, Rapp (2010) observes that the ancient philosopher did not clearly define the term *topos*. Instead, Aristotle provided examples, suggestions, and descriptions to illustrate what a *topos* is. Based on these characterizations, Rapp suggests that "the topos is a general argumentative form or pattern, and the concrete arguments are instantiations of the general topos" (2010, para. 33). That "the topos is a general instruction from which several arguments can be derived, is crucial for Aristotle's understanding of an artful method of argumentation" (2010, para. 33). Usually, topoi indicate three basic elements: a (type of) general instruction, an argumentative scheme (i.e. if x then y relationships), and a general rule or principle that justifies the given argumentative scheme (para. 36). In addition, there are topoi that discuss examples, while other topoi provide instructions for how to apply a specific argumentation scheme. Rapp (2010) further explains that while most topoi are selected based on the formal features of the given conclusion (such as in the functional analysis approach discussed previously), there are topoi that are selected based not on the formal criteria, but according to the material topoi or the content of the conclusion (para. 37). This is similar to what Reisigl (2017) suggests as the content-related analysis of argumentation. These deliberations have several implications. First, there is no standard distinction between the common and specific usage of topoi; rather, the distinction is blurred and is dependent on the selection criteria applied to analyze the argumentation. Second, the selection criteria either

depend on the formal and functional features of the conclusion or on the content of the conclusion; hence the conclusion (or the warrant rule as explained in this section) is a key element in identifying the topoi. Third, as already explained by Reisigl (2017), the topoi are not always explicit. In the case of the material topoi, they need to be expressed explicitly by reconstructing the premise and the argumentative schemes employed.

In this research, the formal and content-related approaches to analysis of argumentation are equally crucial for examining the argumentations presented in the data. In regard to the content or material topoi, since the novel aspect of the research lies in employing the DHA strand of Critical Discourse Studies to another discipline, namely Education Studies, there is no existing list or catalogue of material topoi that is readily available to the researcher. Hence, it is necessary to borrow from other related discourses and from argumentation schemes developed by other scholars. In terms of the first, I refer to the study of discourses on discrimination conducted by Reisigl and Wodak (2001), while the argumentation schemes developed by Kienpointner (1996), Walton, Reed, and Macagno (2008), as well as Walton (2013) have also proven to be useful models. However, Lumer and Dove (2011, pp. 5-8) criticize the use of argumentation schemes and refer to the vagueness of the conclusion rules in the absence of formal criteria for judging whether the statement is good, bad, valid, or invalid. As mentioned in Chapter 1, the goal of this research is to determine what arguments are used or employed to legitimize the country's policy on internationalization, and what are the implications of these arguments for the practices on the ground. It is beyond the scope of this research to assess whether the argumentation used in the data is good, bad, valid, or invalid. I do, however, point to problems of clarity in the argumentations, as vagueness leaves the text open to different interpretations, and will, thus, have an impact on the actual implementation of the policy.

## 4.5.   Study Design
The research design provides a structure for collecting and analyzing data, and reflects the importance attached to a range of dimensions relevant to the topic being studied (Bryman, 2012, p. 45). It describes the method(s) employed and specifies the analysis of data (p. 46). A research method is a technique for collecting data (p. 46). Operationalization is the translation of the abstract concepts into concrete and measurable categories and enables the researcher to systematically collect relevant data. Thus, the data is bound to and framed by theory (Butin, 2010, p. 73).

### 4.5.1. Research process

The international exploratory workshop, "International Education Emergences and Future Possibilities," that I organized for the University of Fribourg in May, 2015, and the discussions I had with the workshop participants around finding alternative spaces for rethinking internationalization of higher education provided the impetus for this research. I used extant literature in the field of international and global higher education as my initial frame of reference. The process of reviewing the literature provided me with the opportunity to critically reflect on the information gaps that exist regarding internationalization of higher education in the Philippines. I reduced Wodak's 8-step recursive process into 5 phases, and incorporated path tracing as one key methodological element. Although my own research process slightly diverged from Wodak's as a consequence of path tracing, I maintained key aspects of the DHA's methodology, such as the pilot analysis and analysis of context and textual structures, detailed analysis of the whole range of data, and formulation of critique.

During the first phase (exploratory phase), I conducted the literature review and initial data collection simultaneously. This was necessary because at the onset of this research project in late 2015, the only policy document available was a draft of the CHEd's IHE policy framework. Thus, the main research method at that point consisted of interviews with several higher education administrators and staff from the CHEd. The results of the semi-structured interviews later provided perspectives on how the policy documents could be better understood and how policies are translated into the vernacular discourse. On the one hand, the insights I gained from these interviews built my background knowledge and general contextual understanding of IHE in the Philippines. On the other hand, apart from the formal definition of IHE by Knight (2008), the data I gathered showed a highly diverse perception of IHE amongst HE community members. My initial theoretical postcolonial lens also proved to be difficult to apply in light of the responses I received from the HE community. I discuss the implications of these results to the research process in Section 4.8. As a result, I refined and redefined my research questions, conceptual lens, and empirical framework.

During the second phase (refocusing phase), I conducted a systematic literature review based on the information I gathered during the exploratory phase and began with the pilot analysis. My starting point for the pilot analysis was the CHEd's Memorandum Order (CMO) 55, released in November 2016, followed by its Memorandum Order (CMO) 62, released a month later. CMO 55 details the CHEd's first policy guidelines for IHE, while CMO 62 focuses on the operation of TNE programs. For the pilot analysis, I conducted a line-by-line reading of the policy documents, taking into account the textual structure and the historical contexts.

Third, I conducted what I call policy path tracing, or tracing the historical sources and references of the data. The pilot analysis did not result in scaling down of data. On the contrary, I added more documents to gain a holistic understanding of my research subject and object. I scaled the scope of my data up as a result of path tracing and by performing search queries in three internet archives (see Section 4.7). To identify the dataset for this study, I ranked the results of the query based on their scope of influence (see Section 4.7.2). Path tracing is a laborious but critical step in the analysis. I borrow the idea from process tracing, a fundamental analytical tool used in within-case qualitative studies in political science. According to Collier (2011), process tracing is helpful for drawing descriptive and causal inferences from "diagnostic pieces of evidence" or data that indicates "temporal sequence of events or phenomena" (p. 824). Process tracing requires careful descriptive analysis of trajectories of changes or continuities in the phenomenon being studied. It also pays close attention to sequences or the unfolding of events over a period of time (p. 824). Specifically, diagnostic evidence are data which exhibit any of the following interrelated types of knowledge:

- Conceptual framework - topics that deserve to be examined, but also includes counterfactuals "that conceptually establish what it means for a given phenomenon to be absent" (p. 824)
- Recurring empirical regularities - established patterns found repeatedly within the same phenomenon
- Theory I - recurring empirical regularities tightly linked into a theory about a phenomenon
- Theory II - causal explanations of why the patterns in Theory I occur (p. 824).

As an analytical tool, process tracing addresses challenges of quality in qualitative research, namely "reciprocal causation, spuriousness, and selection bias" (p. 824). In this research, I make modest claims of descriptive inferences rather than causal inferences due to the limitation of the types of data accessible to me as a researcher. Nevertheless, path tracing is a key element of my research process. It treats the data not as a predefined corpus but as a body of text that needs to be continuously expanded and redefined during the analysis as the researcher seeks to clarify why certain policy ideas are given more weight or emphasis than other (competing) ideas. The researcher thus conducts 'detective work' and follows clues from the data, such as references to certain laws, events, or other documents. These clues are either found directly in the text segments, or mentioned only in passing as footnotes. In path tracing, the researcher must also carefully examine the diachronic changes in the language used in the policies and take into account how ideas are manipulated as a result of the process of recontextualization. In addition, it mirrors the process of weaving together a network of policy documents on a particular issue to reveal how the data are related to each other. Data

collection and analysis are always conducted in reference to the research questions. Path tracing in policy studies thus has implications to how the researcher understands her/himself in relation to the data and how the policy analysis is perceived and carried out.

During the fourth phase (detailed analysis), I conducted a detailed qualitative analysis of the core and supplementary data, while simultaneously further conducting path tracing as the need arose. To avoid what Kozinets (2020) terms "data overload," I focused on the relevance of any new data to the research questions and to the phenomenon of IHE. Thus, policy references to education and higher education without links, either explicit or implicit, to IHE were not included in the dataset. This is parallel to what Wodak suggested as scaling down of data. In the fifth phase (consolidation phase), I consolidated the result of my analysis and formulated my critique.

### 4.5.2. Case study

I used a case study as my basic design to gain a deeper understanding of the nature of the phenomenon being researched in the Philippine context. A case study is best described as an idiographic approach as it entails detailed analyses of a setting to elucidate its complex, unique, and contingent characteristics (Bryman, 2012, pp. 66-68). Tight (2017) describes a case study as *small-scale research with meaning* (p. 9). My research characterizes a combination of types of cases. On the one hand, it is a unique case as the setting, or the context, of the Philippines is unique. In comparison with other emerging countries, its higher education sector has a long history of privatization and massification that date back to the colonial eras. Internationalization activities also originated in the colonial period and current patterns still bear this mark. On the other hand, my research is an exemplifying case because it provides the context of a peripheral, labor-sending country, whose policy orientation towards internationalization remain understudied.

Figure 5:  Research process
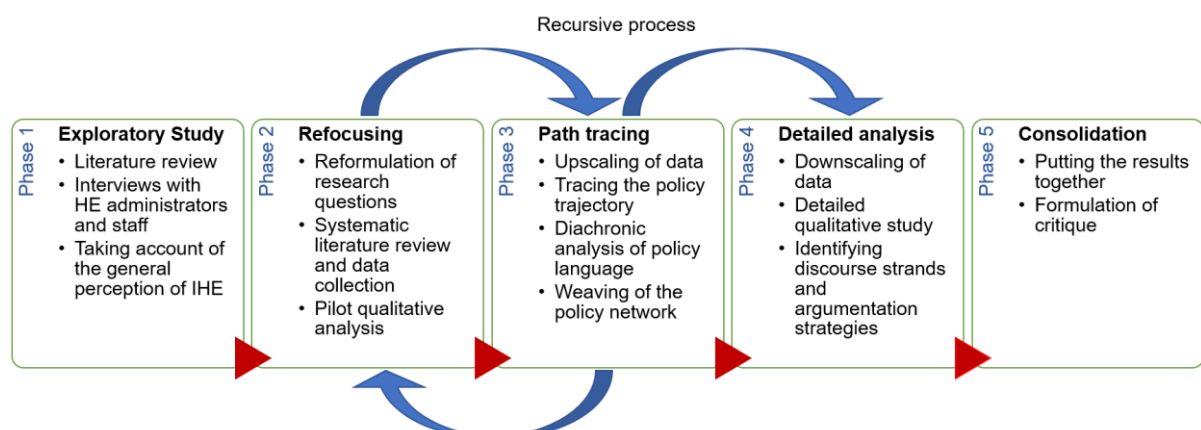
## 4.6. Quality issues

Quality is a major issue that needs to be addressed in qualitative research. To this end, researchers are required to establish the validity and credibility of their research. In 2007, Hammersley stated, "whether there are criteria by which qualitative research can be judged, and if so what character these should have, are issues about which there has been much debate but little agreement" (p. 288). For Hammersley, "the best place to start thinking about the nature and role of assessment criteria is with how researchers actually go about judging quality in doing their work" (p. 289). Assessment criteria in this sense go beyond a finite set of, or a concrete and exhaustive list of, descriptors and indicators that can be ticked-off. Rather, they reflect the researcher's explicit and implicit judgement in regard to considerations that need to be accounted for in determining the quality of the research (also Maxwell, 2013). Hence, the formulation of assessment criteria come out of the process of judgement, and to a certain extent, it is modified by it (Hammersley, 2007, p. 289). At the same time, through the process of reflection, assessment criteria are modified and (re)interpreted to judge quality in other situations or contexts. Within the academic community, much of the debate about qualitative criteria originates from diverging, and to some extent, competing 'paradigms,' or the theoretical, methodological, and value assumptions on the nature of the phenomena being examined, and how they can and should be investigated (p. 292; Bryman, 2012). Likewise, Andrews (2012) claims that ambiguous usage of conceptual frames tends to conflate ontological and epistemological positions of the qualitative paradigm(s). Yet, the values and assumptions that researchers acquire are shaped by their own research practices and philosophical as well as methodological orientations (Flick, 2009). Thus, as Hammersley (2007) explains, the major differences among qualitative researchers are embedded in situated practices that employ varied approaches and ways of thinking about the research process. The complex landscape of varied practices and different usage of a range of labels to characterize these practices' epistemological orientations are what make formulating standards of quality in qualitative research a difficult task (p. 293).
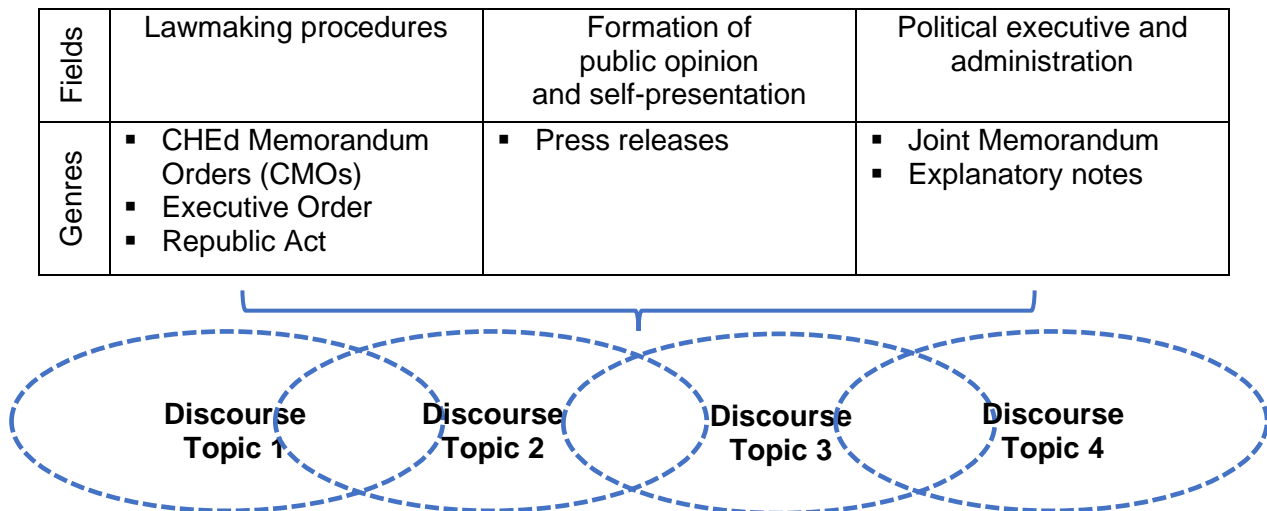
## 4.6.1. Triangulation

I employ triangulation of core data sources as my fundamental strategy to facilitate a more robust understanding of my research data, and to achieve depth and breadth in my analysis (Bryman, 2012, p. 392). Triangulation approach uses at least two data sources or two methods to facilitate a systematic cross-checking of data and to underpin inferences, interpretations, and conclusions (Bryman, 2012, p. 392; Flick, 2007; Ritchie, Lewis, McNaughton Nicholls & Ormston, 2014; Rovai, Baker & Ponton, 2014). Triangulation of data sources means combining "data drawn from different sources and at different times, in different places or from different people," or from different genre as practiced in the DHA (Flick, 2004, p. 178; Wodak, 2015, p.

1). Following Wodak (2001b, p. 68) and Reisigl and Wodak (2016, p. 29), I identify the fields of political action and political genres in my work in Figure 6. This also illustrates the triangulation of genre within the same field.

Figure 6: Dimensions of discourse as social practice

Adapted from Wodak (2001b, p. 68)

| Fields | Lawmaking procedures | Formation of public opinion and self-presentation | Political executive and administration |
|---|---|---|---|
| Genres | ▪ CHEd Memorandum Orders (CMOs)<br>▪ Executive Order<br>▪ Republic Act | ▪ Press releases | ▪ Joint Memorandum<br>▪ Explanatory notes |

Discourse Topic 1    Discourse Topic 2    Discourse Topic 3    Discourse Topic 4

## 4.6.2. Validity

Essentially, validity refers to the quality of the accounts or inferences drawn from the data, not the data or method itself; it relates to the kinds of understanding that accounts can represent (Maxwell, 1992, p. 284; Creswell & Miller, 2000, p. 124). These assumptions, however, do not mean that all accounts are relative, and are therefore incommensurate. According to Maxwell (1992), the concept of incommensurability suggests neither a rejection of comparability (such as the position of extreme relativism) nor the abandonment of any efforts to assess validity of accounts. In other words, it does not preclude the possibility of comparing or assessing accounts by reference to something independent of that account "that goes beyond the sterile opposition between objectivism and relativism" (p. 284). Similarly, other scholars refer to validity in qualitative research as trustworthiness (Burke Johnson & Chistensen, 2014) or credibility (Charmaz, 2014) of the accounts. Charmaz (2014) argues that qualitative researchers need to pay attention to the "depth and scope of the data" as well as the data's "suitability and sufficiency" in illustrating the empirical dimensions of the phenomenon under examination because "a study based upon rich, substantial, and relevant data stands out" (p. 32). However, noteworthy research presupposes not only rich and relevant data, but also a careful interpretive analysis and examination of those data to produce core categories useful for theoretical analysis (p. 34). In the next section, four types of validity (or threats to validity) based on Maxwell's typology are discussed. Although these typologies overlap to a certain

extent, each of them is distinct on its own. In this research, they served as my reference in establishing the validity of my research results.

### 4.6.2.1.　　Descriptive validity

Generally, descriptive validity refers to the factual accuracy in reporting descriptive aspects of the research, such as objects, events, behavior, settings, interactions, etc. (Burke Johnson & Christensen, 2014). It is a primary aspect that bears on all other types of validity and pertains to specific observable physical and behavioral events. It raises questions about the accuracy of description and application of terms, not on the meanings of the terms. Thus, it refers to "issues of omission as well as of commission" in describing accounts (Maxwell, 1992, pp. 286-287). Hayashi, Abib, and Hoppen (2019) argue that descriptive validity in qualitative research refers to the transparency of the research process. To mitigate the threat of insufficient descriptive validity, I conducted a systematic line-by-line analysis of the main policy documents during the pilot analysis. I recorded my comments and notes on the printed version of the documents and transferred them as fieldnotes into the qualitative data analysis software NVivo for analysis at a later stage. In terms of transparency of the analytical process, I incorporated sample text segments to illustrate the argumentation strategies I found in the data.

### 4.6.2.2.　　Interpretive validity (emic validity)

This type of validity primarily pertains to the accuracy of the portrayal of study participants' (conscious and unconscious) viewpoints, perspectives, feelings, thoughts, intentions, beliefs, and other cognitive or mental aspects, or the 'inner worlds,' of the participants (Maxwell, 1992, p. 288; Rovai, Baker & Ponton, 2014, p. 27). Interpretive validity is central to interpretive research, as it seeks to comprehend phenomena grounded on the language and immediate concepts of the study participants, not based on theoretical abstractions or the researcher's perspective and categories. Similar to descriptive validity, interpretive validity is not concerned with the appropriateness of the concepts used, but is interested in the "accuracy as applied to the perspective of the individuals included in the account" (Maxwell, 1992, p. 289). This type of validity seems to apply only to research with interaction between the researcher and the participants. In research focusing on analysis of policy documents where such human interaction is not present, path tracing can address the challenge of interpretive validity. This means that tracing a policy's history and development can provide clues to how the policy in question can be adequately understood. Additionally, during the detailed analysis, I applied In Vivo or verbatim coding as low-inference descriptors (Saldaña, 2016). This means that I used vocabulary found in the policy documents as categories of analysis.

### 4.6.2.3. Theoretical validity

Theoretical validity applies to an "account's validity as a *theory* of some phenomenon" and directly addresses the theoretical constructions that relate to the research, or developed during the study (Maxwell, 1992, p. 291; italics in original). The level of abstraction then goes beyond the descriptive and interpretive levels: it includes explanation of the constructs and the relationship between the constructs employed in understanding the phenomenon (Ritchie et al., 2014). Thus, this type of validity raises concerns as to whether the theoretical construction fits the accounts. According to Maxwell (1992), "the issue is the legitimacy of the application of a given concept or theory to established facts, or indeed whether any agreement can be reached about what the facts are" (p. 292).

The strategy I employed to ensure theoretical validity is twofold. First, I conducted fieldwork which provided me the opportunity to interact with the higher education community in the Philippines. Second, in discussing my analysis, I provided further conceptual definitions of the major discourse strands to locate my arguments within applicable thereotical lenses. In formulating my conclusion and critique, I referred to the conceptual frameworks to illustrate how my analysis supports or rejects the assumptions in the literature.

### 4.6.2.4. Generalizability

This refers to the transferability of the theory developed or the inferences drawn from the study to persons, groups, communities, institutions, settings or contexts not observed, interviewed or examined (cf. Ritchie et al, 2014, on inferential generalization). This is underpinned by purposeful sampling, as opposed to random and other types of sampling in quantitative research that aim for statistical relevance (Maxwell, 1992, pp. 293-294). In case study design, Bryman (2012, p. 406) notes that it is not the design's purpose to generalize beyond the case or population studied. Instead, researchers engage intensively with theoretical analysis in relation to the case. Thus, the hallmark of quality is in the depth and incisiveness of theoretical reasoning (p. 52; Ritchie et al, 2014). However, by ensuring transparency of the methodology, the knowledge generated from a case study design can also be employed in examining similar cases.

### 4.7. Data collection

Data are representations of phenomena in nature, society, education, and culture (Ercikan & Roth, 2006, pp. 15-16). Charmaz (2014) suggests that the modus operandi of data collection shape the content of that data, thus, the method of data collection has consequences on the research (p. 26; p. 33). It is therefore essential that the researcher collects sufficient data to

provide the widest range of dimensions possible within the parameters of the research (p. 33). Referring to texts and documents, Charmaz (2014) argues that:

> People create documents for specific purposes and they do so within social, economic, historical, cultural, and situational contexts. The genre and specific form of a document draw on particular views and discourses. Written texts not only serve as records, but also explore, explain, justify, and/or foretell actions, whether these texts are elicited or extant. What does not become part of a record also can be telling (p. 46).

Text and documents are thus social constructions, not social facts. They are embedded in social processes, are socially construed, and, hence, are part of the discursive practices; details that are not included or have been left out can also provide interesting insights into the phenomenon being studied (Charmaz, 2014, pp. 46-52). Documents in their various forms, then, require analytic scrutiny within the context in which they were produced in the same way that the data collected from the interviews does.

### 4.7.1. Fieldwork

In order to launch this research project, I conducted an exploratory study between 2015 and 2017. From 22nd November to 12th December 2015, I was at the Institute of Southeast Asian Studies as an Associate Fellow and was granted access to library materials and events that focused on the ASEAN Economic Integration. During this time, I also had access to experts on international education in the Southeast Asian context, particularly on Singapore, Malaysia, Myanmar, and the Philippines. I stayed in the Philippines from 12th December 2015 to 26th March 2016. During this period, I was provided a draft copy of CMO 55. I also conducted interviews and an additional literature review focused on the Philippine education system. In July 2017, I returned to the Philippines and conducted another two interviews. All interviews in the Philippines were conducted with staff members of the CHEd, high-ranking higher education administrators, and university professors who are also members of the CHEd's Technical Panel in higher education. Annex 1 shows the schedule of the fieldwork and the list of interviewees. These interviews provided the necessary information about the state of policy on IHE in the Philippines and on what documents I needed to look for.

I also consider three websites as important fieldsites. These are the CHEd's official homepage www.ched.gov.ph, the official website of the Philippine Congress www.congress.gov.ph, and the online version of the Official Gazette of the Republic of the Philippines found at www.officialgazette.gov.ph. These electronic sites are repositories of the official policy documents in their respective domains. The CHEd's website contains relevant information

about the scope of its functions, its policies, memoranda, press releases, issuances, as well as statistics on the higher education sector. I accessed this website between 2016 and 2020. The Philippine Congress is the country's legislative branch and it consists of the House of Representatives and the Senate. Its website includes information about its members, committees, legislative documents, and information for the media. I accessed its website between 2018 and 2020. The Official Gazette is the official journal of the Republic of the Philippines and was created through Commonwealth Act No. 638 in 1941. Its website is the online version of the printed journal. All pertinent legislation, proclamations, administrative and executive orders, and memoranda signed by the President, as well as all versions of the constitutions, are archived on the website. I accessed the Official Gazette online between 2018 to 2020.

### 4.7.2. Sampling

The sheer size and diversity of data sources presented a major challenge in defining the parameters of this research. To overcome this challenge, I mainly employed criterion sampling in selecting the type of data that I required for the research. According to Patton (2001), criterion sampling is a technique wherein cases or samples are selected based on a set of relevant criteria (p. 238). As mentioned, I used CMO 55 (2016) and CMO 62 (2016) as my initial data source. For the pilot analysis, I added the Joint Memorandum No. 01 (2017), and the Executive Order No. 285. After the pilot analysis, I conducted search queries and further added selected CMOs and press releases from the CHEd to extend the scope of my core dataset. The Transnational Higher Education Act and its Explanatory Notes (House Bill 4565) were the last to be added to the core dataset because they were enacted only in July 2019 and published online a month later. All these policy materials do not only contain information to be examined (e.g. what does it say / not say), but also have their own spheres of influence or impact (e.g. what does it do / not do). They also show various stakeholders' extent of engagement on the phenomenon of internationalization.

### 4.7.2.1. CHEd memorandum orders (CMOs)

Following criterion sampling technique, I performed a search query based on keywords widely-used by scholars and academics in connection with the concept of internationalization as well as keywords that are specific to the Philippine context. Below are examples of these keywords:

- Generic keywords:
    - nouns, such as: "international," "foreign," "abroad," "overseas," "world," "global," "transnational," "cross-border," "mobility," "exchange," "recognition," or

"accreditation," "regional," "domestic," "local," "inter," "alien," "scholarship," "partnership," and "agreement"

- o references to regions or countries, such as: Asia, Europe, Africa, Middle East, North America, Central America, South America, Caribbean, USA, New Zealand, Australia, UK, Qatar, UAE, KSA, China, Japan, and explicit references to the Philippines or any regions in the Philippines
- o references to organizations, such as: ASEAN, UN, EU, APEC, British Council

From 1994 to 2019, the CHEd issued a total of 1,110 memorandum orders (called CMOs) on diverse topics, but mainly on policies, guidelines, implementation rules and regulations, operational guidelines, and the like. It published 20 Joint Memoranda from 2016 to 2020. These CMOs and Joint Memoranda demonstrate the scope of the CHEd's power in regulating the Philippine higher education system. They are available as downloadable pdfs from the CHEd's official website, under the rubric Resources and sub-rubric Issuances. The text documents are organized chronologically by year and then by number. As regards the CMOs, the policy texts were saved as scanned documents until 2017, a format that is unsuitable for automatic search queries within the text documents. Within the main website, word queries only yielded the year where the searched terms or words could be found, but not the specific documents. Therefore, I had to read through the titles of CMOs year by year to select the samples that were relevant to my research. The manual search query yielded a total of 32 CMO titles that fit the criteria (defined keywords) enumerated above. To further eliminate documents that were not relevant to the study, such as conference invitations, I added another criterion related to the actual content of the documents:

- The content must directly or indirectly indicate any of the following keywords: "implement," "program," "guidelines," "framework," "policy," "rule," "regulation" or "strategy"

This elimination process resulted in a total of 24 CMOs that are approximately concerned with various dimensions of internationalization. To further select the most relevant policy document, I conducted a document analysis that involved skimming and an initial reading of the text documents. At this stage, I utilized the intensity sampling technique which allows for a selection of a small number of samples that provide in depth knowledge and rich or excellent examples of the phenomenon being studied (Cohen & Crabtree, 2006). Thereafter, I assigned the documents into three hierarchical categories based on the scope of their influence. Based on the query results, I chose CMO 55 (2016) and CMO 62 (2016), as the starting point for analysis and examination as they provide rich examples and in-depth knowledge about the country's

internationalization policy. During my fieldwork, the CHEd officials interviewed for this research also referred to CMO 55 as their key policy text on IHE. The remaining CMOs were included in the core dataset to gain a holistic understanding of the CHEd's approach to IHE. Thus, I utilized them for the analysis not only to support and corroborate my interpretation, but also to illuminate any discrepancies or inconsistencies in my readings.

### 4.7.2.2.        CHEd press releases

From 2012 to 2019, the CHEd released 153 press releases (herewith called PRs). As in the case of the CMOs, these PRs are available on the CHEd's website under the rubric Resources and sub-rubric Press Releases. The PRs are organized chronologically by year and then by date. All documents can be found as texts on the webpage; fourteen releases have a downloadable pdf version, while twelve releases do not have pdf versions. As such, the format is suitable for automatic search queries within the website and within the documents themselves. An exception to this is a file from 2012 which was scanned as an image, not as a text document. The seven-year time frame from 2012 to 2019 represents the period wherein public access to the CHEd's press statements, both current and archived, are available. It represents the last four years prior to, and the last three years after, the official publication of CMO 55. This stretch of time is helpful to illustrate the CHEd's public engagement with the concept of internationalization before and after it codified the Philippine higher education system's internationalization strategy. As with the CMOs, I used criterion sampling to select the PRs relevant to my research and applied the same criteria for the keyword queries. In the first query, the sampling produced 28 PRs. My initial document analysis confirmed the relevance of these PRs thus I have included all in my dataset.

### 4.7.2.3.        Executive Order (EO) No. 285 (2000)

This document was included in the core dataset as a result of path tracing. Specifically, CMO 55 refers to EO 285, which was signed and enacted in 2000, as the prevailing law that regulates the admission and residence of foreign students in the country. The policy version used in this study comes from the Official Gazette. Considering that this website archives all policies and constitutions issued by the national government, it is necessary to specify the query to ensure that only the relevant document is returned.

### 4.7.2.4.        Republic Act (RA) No. 11448 (Transnational Higher Education Act)

On the Philippine Congress website, I used the search keyword "higher education" to ensure that all legislation pertaining to IHE was included in the results. The query generated 337 documents, including pending proposals. To further limit the query, I only searched for documents tagged as Republic Acts, or legislation proposals that have been approved by

Congress. This criterion narrowed the result down to 7 documents. From these 7, only 1 is relevant to IHE. This policy is called the Transnational Higher Education Act or Republic Act (R.A.) 11448. The Explanatory Notes

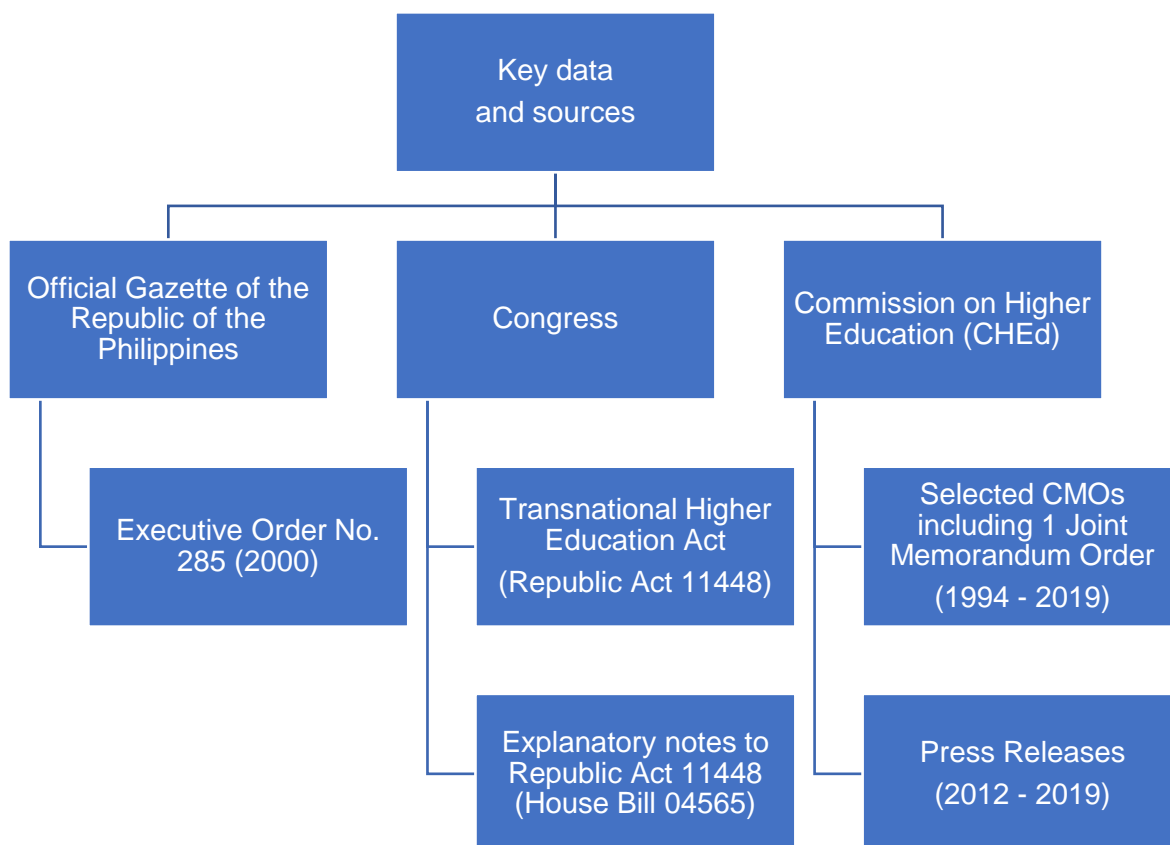Figure 7:  Key data and sources used in this research

Table 2: Data samples of CMOs

| Nr | Policy documents | Scope of influence |
|---|---|---|
| 01 | CMO No. 55, Series of 2016 – Policy Framework and Strategies on the Internationalization of Philippine Higher Education | High – discusses the policy and internationalization strategy; relevant to all stakeholders of the higher education sector. |
| 02 | CMO No. 46, Series of 2012 – Policy-Standard to Enhance Quality Assurance (QA) in Philippine Higher Education through an Outcomes-Based and Typology-Based QA | High – discusses the policy on quality assurance; relevant to all HEIs. |
| 03 | CMO No. 62, Series of 2016 – Policies, Standards and Guidelines (PSGs) for Transnational Education (TNE) Programs | High – discusses the policy on TNE; relevant to all stakeholders of the higher education sector. |
| 04 | CMO No. 02, Series of 2015 – Lifting of Moratorium on the Offering of Programs via Transnational Education (TNE) | Medium – relevant to all autonomous and deregulated HEIs, as well as HEIs that have programs accredited at level III. |
| 05 | CMO No. 01, Series of 2000 – Policies and Guidelines in the Implementation of International Linkages and Twinning Programs | Medium – discusses policy on linkages and twinning programs; relevant to HEIs that have at least level II institutional accreditation status. |
| 06 | Joint Memorandum Order No. 01, Series of 2017, Consolidated Implementing Guidelines on the Entry and Stay of Foreign Students in the Philippines Pursuant to Executive Order No. 285, s. 2000 | Medium – provides guidelines on the implementation of Executive Order No. 285. |
| 07 | CMO No. 22, Series of 2016 – Guidelines for Foreign Scholarships for Graduate Studies for Faculty and Staff during the K to 12 Transition Period | Medium – provides guidelines for HE faculty and staff qualified to apply for foreign scholarship. |
| 08 | CMO No. 33, Series of 2013 – Policies and Guidelines on University Mobility in Asia and the Pacific (UMAP) Credit Transfer Scheme (UCTS) | Low – operationalizes the UMAP Credit Transfer Scheme; relevant to HEIs that are members of UMAP. |
| 09 | CMO No. 11, Series of 2014 – Guidelines for Participation of Selected Higher Education Institutions (HEIs) in the ASEAN International Mobility for Students (AIMS) Program | Low – operationalizes the ASEAN International Mobility for Students (AIMS); relevant only to HEIs selected by the CHEd. |
| 10 | CMO No. 19, Series of 2015 – Operational Guidelines for the Implementation of the ASEAN International Mobility of Students (AIMS) Program | |
| 11 | CMO No. 07, Series of 2019 – Guidelines for Implementation of CHED-British Council Joint Development of Niche Programmes | Low – operationalizes the agreement; relevant only to HEIs selected by the CHEd and the British Council. |

Table 3: CHEd press releases included in the dataset

| Nr. | Title of press releases | Date of release |
|---|---|---|
| 01 | CHED assures public that plight of Pinoy OJTs abroad are addressed | August 30, 2012 |
| 02 | Academic calendar and Philippine higher education | May 29, 2014a |
| 03 | CHED studying academic calendar | May 29, 2014b |
| 04 | CHED and UC-Berkeley MOA and RFA Turnover Ceremony | February 13, 2015a |
| 05 | PH-Canada academic cooperation to strengthen ties in the next three years | March 23, 2015b |
| 06 | CHED on 2015 QS World University Rankings | September 17, 2015c |
| 07 | Filipino engineers and architects will not lose jobs in Qatar | February 3, 2016a |
| 08 | CHED and British Council partner to send faculty scholars for PhD studies in the UK | August 08, 2016b |
| 09 | CHED pushes for world-class research and development in the PHL | April 07, 2017a |
| 10 | ASEAN experts on higher education share best strategies, trends in leadership and governance | May 11, 2017b |
| 11 | CHED opens up graduate scholarships in Paris | June 7, 2017c |
| 12 | ASEAN, EU to boost student mobility in the ASEAN region | June 14, 2017d |
| 13 | CHED taps CBIE for scholarships, training programs in Canada | June 20, 2017e |
| 14 | Student mobility a major driving force in improving higher education in ASEAN region | June 20, 2017f |
| 15 | CHED, Ministry of Education of Lao Sign MOU on academic cooperation in higher education | July 19, 2017g |
| 16 | Comparability of qualifications among ASEAN member states becoming crucial | July 24, 2017h |
| 17 | CHED awards P9.2-M to 27 high-quality academic journals | August 22, 2017i |
| 18 | Higher education and S&T take center stage in PH-hosted APEC meet | October 23, 2017j |
| 19 | Philippines-New Zealand sign education cooperation agreement during ASEAN Summit | November 17, 2017k |
| 20 | CHED urges LUCs to adopt best practices of Canadian community colleges | October 12, 2018a |
| 21 | CHED Chief to Filipino students: seize the opportunity to visit other countries, engage in greater student mobility | October 16, 2018b |
| 22 | More Philippine HEIs enter Asian university rankings, UP climbs three notches | October 24, 2018c |
| 23 | Creation of PH National English Roadmap kicks-off at 3-day confab | November 13, 2018d |
| 24 | PH-Turkey sign deal to strengthen academic cooperation | November 28, 2018e |
| 25 | RP-UK educational collaboration key strategy in internationalization and competitiveness | January 25, 2019a |
| 26 | CHED-IAS conducts internationalization mentoring | January 29, 2019b |
| 27 | Asia, UK higher education and industry leaders to strengthen ties in 2-day policy forum | March 5, 2019c |
| 28 | PH, US universities push for internationalization of higher education | June 3, 2019d |

## 4.8. Researcher bias

Another threat that can impede the quality of the research is researcher bias, or the tendency to conduct selective observation, recording, reporting, examination, and interpretation of data. In other words, the researcher obtains results which are consistent with what the researcher wants or expects to find. This implies that the research process, and by extension, the research results are biased by the researcher's own perspectives and intentions. Literature on social research suggest reflexivity during the research process to overcome research bias. Reflexivity refers to critical self-reflection on the part of the researcher regarding one's own motivations, intentions, theories, and predispositions (Burke Johnson & Christensen, 2014).

Originally, I set out to utilize the postcolonial lens as my analytical framework. My interest was heightened by my observations that a confrontation of postcolonial conditions is lacking in the Philippine context in the field of international higher education. This observation was partly based on my experiences, and partly on the limited literature on the topic that I have access to. However, during the fieldwork and the exploratory phase of the study, particularly during the first set of interviews with higher education experts, I began to question my motivations for using the postcolonial lens. I was confronted with questions, narratives, and information that triggered cognitive dissonance on my part as a researcher, and as an emigrant Filipino. To ensure that I was not operating within my own biases, I reflected on my goals and motives for using the postcolonial lens. Although all my resource persons during the initial phase of the study acknowledged the continuing impact of the country's colonial history on current societal conditions, they emphasized the need to "look forward" and refused to be treated as victims. They are aware that the Filipino mind has been 'brainwashed' by the colonizers, but in terms of internationalization, they insisted that one needs to play the strategy game. One resource person explained it metaphorically: "… kaya nga matututo kang lumangoy… sumama sa agos pero meron ka dapat na strategy…" (that's why you need to learn how to swim… go with the flow, but you must also have a strategy) (Resource Person no. 5). Another pointed out internal colonialism in the Philippines as a more accurate topic and pressing issue, particularly in regard to the conflicts between Christians, Muslims, and indigenous minorities (Resource Person no. 6). Based on these statements, the location of power differentials is not necessarily between the foreign and the local, but within the society and the social structures created through the historical contexts. These insights emphasize two crucial elements in policy analysis and in social research in general: the continuities and disruptions of/in history (in the Philippines, its colonial history), and the agency or volition of the social actors (e.g. the elites and the masses). This is especially true regarding topics that deal with power relationships regardless of the level of analysis. On the other hand, I also recognize the problems that these stances raise, especially in regard to my resource persons' position within the power structures within the

country's HE sector and within their own institutions. A further analysis of their attitudes and value systems is an interesting topic on its own, but something that is outside the scope of this study. Likewise, in re-reading the data, I also began to see the issues through the lenses of my resource persons. These internal dialogues strengthened my conviction as a researcher that, in this particular case, it would be inappropriate to (re)present my research participants in ways contrary to their self-image and self-knowledge. This statement, however, does not foreclose a critical attitude towards statements made by research participants. My main concern was my own motivation for employing the postcolonial lens, and the risk of forcing my data interpretation to fit the postcolonial theory, thus undermining the credibility of my analysis. Through these reflections, I came to the conclusion that my research goals and the research questions I wanted to examine were not productive for a postcolonial study. Therefore I decided to set aside the postcolonial theory as my prime analytical lens. The outcome of this long process compelled me to re-write major chapters of the dissertation, particularly those chapters that deal with conceptual and methodological theories, and shift my focus to policy analysis while maintaining my commitment to critical inquiry. However, to acknowledge the structures of coloniality of power (Quijano, 2008), I also considered in my analysis the impact of the colonial heritage on the discourses on internationalization of higher education in the Philippines.

I acknowledge my positionality as an insider and outsider in Filipino and European cultural contexts. On the one hand, as a product of the European graduate education system, my perspectives and understanding of the research process, theories, and methodologies are essentially European-orientated. On the other hand, as an immigrant and a member of an ethnic minority in Austria, I am perceptive of the implications of European ideas on so-called economically developing or emerging countries and the tensions that such ideas produce. As a Filipino, my position is also strained by my status as an insider and an outsider. As a native of the Philippines, I speak the vernacular Tagalog, have lived in the capital city Manila for 23 years, and have gone through the education system from kindergarten to undergraduate university. Thus, I am aware of the complexity of the social structures in the country. However, I am also an outsider in the sense that I am not a graduate of any of the 'elite' universities, and therefore lack the social capital in a Bourdieusian sense (Bourdieu, 1984) to help me easily navigate the systems of the social hierarchy. This was evident during my fieldwork, when access to some interviewees and data was barred due to my alienation from their social status.

My own personal background and experiences as a former labor migrant from the Philippines, my professional activities in the field of international higher education, and my own research interest in the cultural and social legacies of colonialism and imperialism not only provided the

impetus to conduct this research, but largely influenced on how I approached the whole research process. My socialization in the European academe has provided me with opportunities as well as limitations in my approach to this dissertation. Likewise, my position as an insider/outsider in both the Filipino and European contexts has required me to create a "third space" in my cognitive schemes to consolidate and transcend the oppositions that my socialization in two different contexts has produced.

## 5. Discourse analysis

At this point, it is necessary to review my research goals and questions before proceeding to the analysis. I formulated three questions to address the problems and issues discussed in Chapter 1.

1. What discourse strands can be identified from the internationalization policy documents?
2. How can the internationalization policies be discursively interpreted and understood?
3. How do they impact discursive practices in internationalization of higher education in the Philippines?

This Chapter addresses the first two questions through an analysis of the data. In this research, I endeavor to examine the ideologies and paradigms that underlie the Philippine's policies and strategies on internationalization of higher education. To achieve this, I chose to employ the DHA stream of the CDS as my analytical method because it specifically emphasizes the context-dependence and multidimensional nature of discourse

### 5.1. Introduction

The process of engagement, that is reading and re-reading the texts, enabled me to gain deeper insights into the layers of meanings and discern the argumentation patterns contained in the documents. To support the claims I make, it is necessary that I situate my analysis within the historical and socio-political contexts of the country. Path tracing, the analytical technique I employed, can be compared to detective work. It included tracing the origins of policy ideas and examining the network of policies to make sense of the data. This approach consisted of several steps. First, I conducted a close reading of the materials, taking the contents of the documents at face value. During this process, I manually highlighted words and phrases that indicated key terminologies, definitions of concepts, statements of goals and purposes, references to other policy texts, and emphasis on specific areas. This is necessary to understand the documents' formal structure, the linguistic features such as grammar, style and genre, the audience or readership they address, and the main ideas that they communicate. To gain distance from the data and approach the next step afresh, I waited several weeks before revisiting the data. This time, my goal was to specifically examine the contents in relation to my theoretical and methodological frameworks, while also keeping in mind my research aims and questions. During this analytical reading, I wrote memos in a separate notebook, mainly noting questions on the argumentation logic used in the documents. For example, in reference to CMO 55, the first question that arose was:

*What is the purpose of mentioning the Philippine Constitution and the Higher Education Act of 1944 in the first paragraph of CMO 55? There seems to be a relevance attached to these documents as they appear in every memorandum order that the CHEd has issued. What are the specific commitments being referred to here? How are they relevant in this study?*

Writing the memos was an essential part of the reading process, as the questions I asked became the starting point for the pilot analysis. I started examining CMO 55 and CMO 62 line by line, noting the particular linguistic features, such as sentential meanings and use of tenses, the argumentation schemes used to justify concepts and ideas and their location in the document, their implications and the possible variations to interpretation. I focused particularly on the topoi of argumentation and how they occur and reoccur throughout the documents. During this step, I also continuously referred to the functional model of argumentation schemes to illustrate the various ways of representing the argumentation schemes used. This step was crucial not only for the purpose of visualizing the hidden premises in the text, but also for identifying the best plausible interpretation. After the pilot analysis, I transferred the policy documents into the qualitative data analysis software, NVivo, to systematically organize the data coding process. At this stage, I used the topoi as descriptive codes. I then included the the rest of the documents into the data set in NVivo to extend the depth and scope of the data. During this part of the coding, I assigned additional descriptive codes to capture the topoi that emerged from the added documents, but which I did not identify during the pilot analysis. According to Saldaña, the process of qualitative coding is not mere labeling, but is essence-capturing and is an important element of qualitative research (2016, p. 8). For the last step, I clustered these topoi/descriptive codes into thematic categories that form the discourse strands in the documents and provide direction for the detailed analysis. The last and final stage was the detailed analysis. Here, I combined the results of the first reading and pilot analysis to reconstruct the discourse strands. The goals of this enterprise were to identify patterns in the discourse fragments, examine the relationships between them, and assess how they relate to and organize the broader discourse. An essential step at this stage of the analysis was to examine how the discourse strands are embedded in the historical context, how they have shifted or have been calcified, and how they relate to each other and to the broader, global context. These guide questions helped me delineate the factors, structures, and unique characteristics of the discourse on internationalization of higher education in the Philippines. In the following sections, I present the core findings of my analyses. As discussed in the methodology section, it is an imperative to embed the examination of the current discourses in the socio-historical context of the phenomenon being studied. This also implies investigating the diachronic changes in the language that mark the discourse strands. In doing so, one can

identify patterns in and of the discourse. The focus of this study is on the specific discourse strands that structure the broader discourse on internationalization. However, as Jäger and Maier (2015, p. 155) point out, since texts usually consist of several discourse fragments from various discourse strands, discourse knots or entanglements occur. In other words, a 'pure' discourse strand is unusual. Thus, these entanglements illustrate how different ideas become imbricated to constitute a phenomenon.

A visual inspection of the CHEd's press releases from 2012 and memorandum orders from 1994 to 2019 reveals a notable change in the patterns of engagement with the concept of internationalization, not only in terms of intensity or level, but also in regards to the essence and themes. The initial engagement was sporadic, and at best, selective. From 1994 to 2008, two major themes related to internationalization can be observed: the regulation of residency of incoming foreign students in the Philippines; and the implementation of policies on linkages, particularly twinning programs, and transnational education. Basically, the CHEd released these memorandum orders as a response to macro policies, e.g. Executive Order (EO) No. 423 on incoming foreign students, and the commitment to ASEAN integration. Starting in 2013, however, the intensity increased, beginning with the release of CMO 33 that addresses the University Mobility in Asia and the Pacific (UMAP) Credit Transfer Scheme (UCTS). CMO 11 followed in 2014 and provides guidelines on the ASEAN International Mobility for Students (AIMS) Program. Moreover, the increase in the level of engagement, at least in regard to the documents I studied, coincided with the policy formulation and implementation of the Enhanced Basic Education Act of 2013, popularly known as K-12 reform. One way of explaining this link is through the increase in numbers of linkages or partnerships for postgraduate foreign scholarships for higher education faculties who were going to be affected by the change in the system and in the curricula. Beginning in 2017, after the release of CMO 55 in November and CMO 62 in December 2016, press releases on internationalization increased dramatically, signifying intensified official engagement and activities in this policy area. This can be attributed primarily to the country's ASEAN chairmanship in 2017. Furthermore, the scope of activities has become more diverse, covering linkages or collaborations, mobility, and research initiatives. These themes are also reflected in the policy texts examined in this study. To visualize the occurrences of broad themes in the policy documents and press releases, I ran a simple word frequency search using Nvivo 12. The list in the table below only includes the 25 most frequent words with 3 or more letters mentioned in the documents. The minimum word length is a practical criterium to eliminate words such as pronouns, prepositions and conjunctions, which are irrelevant at the initial stage of the analysis. The weighted percentage is the frequency of the word relative to the total words counted, which is 989.

Table 4: Word rank in CMO 55 and press releases.

| Rank | Word | Count | Weighted Percentage (%) |
|---|---|---|---|
| 1 | Education | 322 | 2,31 |
| 2 | Higher | 212 | 1,52 |
| 3 | CHED | 183 | 1,31 |
| 4 | international | 163 | 1,17 |
| 5 | internationalization | 139 | 1,00 |
| 6 | Philippine | 134 | 0,96 |
| 7 | university | 123 | 0,88 |
| 8 | academic | 118 | 0,85 |
| 9 | HEIs | 109 | 0,78 |
| 10 | programs | 107 | 0,77 |
| 11 | Philippines | 106 | 0,76 |
| 12 | students | 103 | 0,74 |
| 13 | mobility | 95 | 0,68 |
| 14 | development | 85 | 0,61 |
| 15 | research | 84 | 0,60 |
| 16 | ASEAN | 72 | 0,52 |
| 17 | quality | 71 | 0,51 |
| 18 | faculty | 70 | 0,50 |
| 19 | institutions | 68 | 0,49 |
| 20 | national | 66 | 0,47 |
| 21 | student | 62 | 0,44 |
| 22 | program | 59 | 0,42 |
| 23 | cooperation | 56 | 0,40 |
| 24 | country | 56 | 0,40 |
| 25 | universities | 56 | 0,40 |

This search was helpful in locating the categories in the documents and in reconstructing the data for the detailed analysis. However, the prominence of the terms listed in the table is only indicative of the patterns in the documents. For instance, as the documents are from the CHEd and are directly linked to the country's internationalization activities, high occurrence of terms such as CHEd, higher education, internationalization, programs, students, mobility, and the Philippines can be expected. The detailed analysis led to the identification of four major interrelated discourse strands: Marketization, ASEAN, Quality, and Nation. While the discourse strands on Marketization and ASEAN are tightly linked to a shared ASEAN Higher Education Area and shared market space, the discourse on Quality is heavily characterized by the ideas of reputation, control, and regulation. Similarly, the discourse strand about the Nation is entangled with the concepts of geography and boundaries, reputation (intertwined with quality), national security, and development. There are no clear boundaries between these concepts; on the contrary, they are characteristic of entanglements that have their roots in the overall societal discourse in the country.

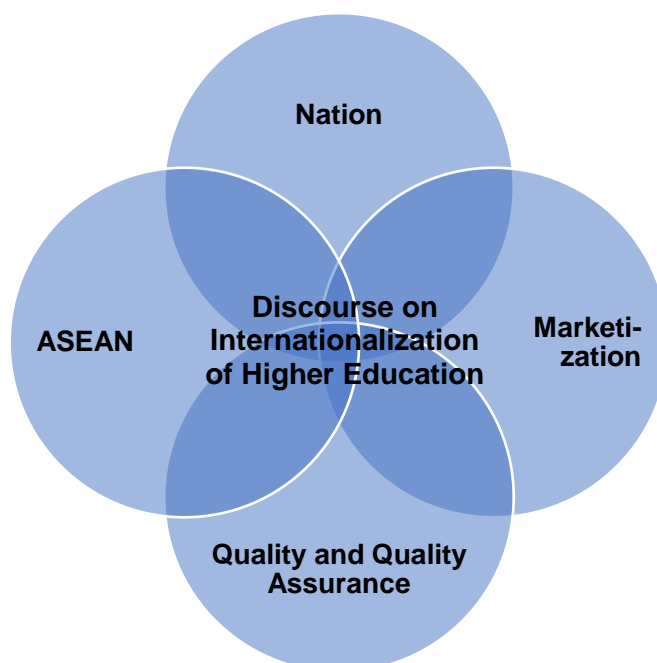Figure 8: Discourse strands in Philippine IHE policy



Figure 9: Major discourse topics found in the dataset



| Marketization | Quality and Quality Assurance | ASEAN | Nation |
|---|---|---|---|
| •Globalization<br>•Employability<br>•Competitiveness<br>•Market access<br>•Knowledge production | •Reputation (safeguard, enhance, protect)<br>•Control mechanisms<br>•International standards<br>•International recognition<br>•Qualifications<br>•Modernization | •Mobility (individuals, institutions, programs)<br>•Market access<br>•Competition<br>•Collaboration<br>•ASEAN economic integration | •National security<br>•National development<br>•National interests<br>•Sovereignty<br>•Human resource development<br>•Global competitiveness |

## 5.2.    Analysis of the documents' macro-structures

All the documents examined in this study belong to the policy genre in the fields of political action and control. In particular, the genres CMO, Republic Act, and Executive Order can be subsumed under the field of lawmaking procedures as these documents have the "force of law" and have legal implications ("What Is an Executive Order?," 2020, para. 2). On the other hand, the genres Joint Memorandum and Explanatory Notes for R.A. 11448 fall under the field of political executive and administration (Wodak, 2001b, p. 68). Generally, policy documents can

be classified under what Fairclough (2003) coins as "genre of governance" because they govern "the way things are done" (p. 32). They inform their audience about the issuer's official standpoint on, and the parameters of, a policy issue; impart directives or commands; or articulate binding prescription of rules of conduct concerning a specific policy topic or field. Press releases, on the other hand, belong to the field of formation of public opinion and self-presentation because they promote a particular image of the issuer and are intended to influence public opinion. As can be expected from policy documents, the writing style is impersonal, formal, and direct, indicating directive speech acts. This is particularly evident in the frequent use of the modal verb "shall" which, among other possibilities, expresses an instruction or a command. Further, the use of shall intensifies the illocutionary force of the directives.

### 5.2.1. Memorandum orders (1994 to 2019)

The CHEd officially released CMO No. 55, series of 2016, entitled "Policy Framework and Strategies on the Internationalization of Philippine Higher Education," on 11th November 2016. This document is the CHEd's key policy text that pertains to the Philippine higher education system's internationalization strategy. Furthermore, CMO 55 serves as the nexus between policy and practice of internationalization in the country. To illustrate, the International Affairs Section of the CHEd is started in 2020 to conduct a nationwide campaign that includes seminars and workshop to disseminate CMO 55 and assist interested HEIs in developing their internationalization strategies based on the instructions and directions provided in CMO 55. CMO 62, entitled "Policies, Standards and Guidelines (PSGs) for Transnational Education (TNE) Programs," issued on 29th December 2016 is the CHEd's key policy text for the implementation of Transnational Education or TNE programs. It is an important CMO as it provides the template for the Transnational Higher Education Act promulgated in the Philippine Congress. The other CMOs were released prior to CMOs 55 and 62 and pertain to selected policy areas in internationalization, such as linkages and collaboration, incoming student mobility, or credit transfer, whereas CMOs 55 and 62 are much more comprehensive in their focus.

Conventional dictionaries define memorandum as a document written to inform a specific group about something. Its legal status depends invariably on the specific purposes it serves (for example, in court orders informing about legal decisions, or formal and informal memos in business contexts). In the case of the CHEd's memoranda, their legal nature is confirmed by the noun, *Order,* which precedes the noun, Memorandum, and which I translate as a directive on how to do something. Since the CHED is an agency of the Office of the President, it represents the government in matters pertaining to higher education. The fact that the

document is called a Memorandum *Order*, instead of just a memorandum, it provides directives on a policy issue, and as a policy instrument it bears legal implications. However, since the CHED also disseminates the CMOs on its website and is thus accessible to the public, they also influence the formation of public opinion, attitudes and will towards the policy issue. In addition, the CHED's website primarily functions as an information platform for the public and other stakeholders in higher education, although the information available is limited (i.e. it does not include any statistical information on foreign students studying at the CHED's institutions or on Filipino students on study exchange abroad). As a policy document, an MO can be modified, replaced, or repeal the validity of previous MOs issued on the same subject. The CHEd's MOs follow a specific template (presented here in the order that each part appears in the document):

- Heading consisting of the CHED's logo on the left upper-hand side, the three lines, "Republic of the Philippines," "Office of the President," and "Commission on Higher Education" (the last two are written in bigger, bold fonts), in the middle, and the official stamp on the upper right-hand side indicating "Official Release" (in bold fonts) from the CHED's Central Offices, Records Section.
- CMO number and series number
- Subject line

It is important to note that the 1987 Philippine Constitution as well as the Higher Education Act of 1994 serve as the introduction to the main section of most CMOs that the CHEd issues, regardless of the policy topic or subject of the memorandum. Exceptions to this in relation to the dataset are CMO 62 and the Joint Memorandum Order (JMO) No. 01. Additionally, CMO 62 does not mention the Philippine Constitution. Instead, it refers to the Commission en banc (CEB) Resolution No 877-2016 and 921-2016 and to other relevant policies and guidelines on program offerings and the establishment of higher education institutions in the country. Since the 1987 Constitution also regulates the establishment of higher education institutions, CMO 62 refers to it implicitly when it mentions "other relevant policies." Joint Memorandum No. 01, on the other hand, refers to Executive Order (EO) No. 285, issued in 2000. The body of the policy document is further divided into several parts called Articles. For purposes of illustration, I discuss the macro-structures of CMO 55 and CMO 62. CMO 55 begins with the usual reference to the Higher Education Act of 1995 and to the 1987 Constitution. It also expresses its commitment to bilateral, multilateral, regional, and international agreements of the Philippine Government in higher education. The document is divided into the following Articles:

- Article I referring to background and context

- Article II indicating the objectives of the CMO
- Article III defining key concepts and terminology
    - Section 1: Concept of Internationalization
    - Section 2: Home-based Internationalization
    - Section 3: Cross-border Education
    - Section 4: Terminology
- Article IV outlining the general principles, policies, and strategies
- Article V discussing academic mobility
- Article VI addressing program and institutional mobility
- Article VII focusing on international academic cooperation agreements
- Article VIII defining implementation strategy
- Article IX prescribing implementing mechanisms
- Article X stating the CMO's transitory provisions
- Article XI stating the separability clause
- Article XII stating the repealing clause
- Article XIII indicating approval and effectivity
- Date and place of issuance
- Name, designation, and signature of the signatory
- Annex A illustrating the template to be used to collect information on university profile and international linkages

CMO 62 follows the same template. Its body is divided into the following Articles:

- Article I discussing the general principles and policies
- Article II defining terms
- Article III enumerating the general objectives
- Article IV defining the categories of Transnational Education Programs
- Article V identifying the policy's scope and coverage
- Article VI stating the implementing guidelines and procedures
    - Section I: Eligibility for Foreign Higher Education Providers (FHEPS) which will offer Inbound TNE
    - Section II: Eligibility for Philippine Higher Education Providers (PHEIs) which will offer Outbound TNE
    - Section III: Registration Guidelines and Procedures
- Article VII regulating the announcements on Transnational Education
- Article VIII stating the revocation of existing authority to operate TNE

- Article IX delineating the sanctions for non-compliance
- Article X stating the transitory provisions
- Article XI stating the separability clause
- Article XII defining the exemption and reservation clause
- Article XIII indicating approval and effectivity
- Date and place of issuance
- Name, designation, and signature of the signatory
- Annex 1 attaching a copy of the UNESCO/Council of Europe Code of Good Practice in the Provision of Transnational Education including its Explanatory Memorandum
- Annex 2 illustrating templates to be used to collect information on university's profile, faculty profile, and technological infrastructure

### 5.2.1.1. Topics and audience

The main topical framework of the texts can be found in the heading and subject line of each document. The intended audience is the administrators and faculty members of higher education institutions operating in the Philippines, as well as researchers and stakeholders who are directly or indirectly involved in internationalization activities of the higher education sector. Again, I will use CMO 55 and 62 to illustrate the topics these documents address. In CMO 55, the following topics are discussed:

- Background and context of the policy issue
- Policy rationales
- Concept of internationalization
- Definitions and delineations of the policy framework and strategies
- Academic mobility
- Program and institutional mobility
- International academic cooperation and agreements
- Implementation strategy and mechanism

In this document, the CHEd also refers to a few sources as references. These include the publications of Knight and de Wit (1997, 1999), Scott (1998), Knight (2003, 2004), UNESCO and Council of Europe Code of Good Practices in the Provision of Transnational Education (2001), and Project Atlas. The CHEd, however, did not include a reference list, which makes it difficult to trace the sources of information, particularly regarding the scholarly works of the above-mentioned authors.

Similarly, CMO 62 addresses the topics presented below. It does not refer to academic or research literature, but takes the definitions and categories of TNE programs from the Council of Europe/UNESCO Convention on the Recognition of Qualifications concerning Higher Education in the European Region (the Councl of Europe/UNESCO Lisbon Recognition Convention). This document, including the explanatory note, are attached as Annex in CMO 62. CMO 62 addresses the following topics:

- General principles of the policy
- Pertinent policies relevant to the design
- Definition of terms and categories of TNE programs
- Objectives of the CMO
- Eligibility requirements for participating HEIs
- Operational guidelines and procedures
- Conditions for revocation and sanctions of permits
- Exemptions and reservation clauses

### 5.2.1.2.    Establishing legitimacy

The policy text, CMO 55, begins with the following introduction:

> In accordance with the 1987 Philippine Constitution and Republic Act No. 7722, otherwise known as the "Higher Education Action of 1994," and taking into account the Philippine Government commitments to bilateral, multilateral, regional and international agreements in higher education, including its trade as services, hereunder are the policies, strategies and guiding principles on the internationalization of Philippine Higher Education.

This paragraph implies the Topos of Law. This can be made explicit by using the formal structure of argument following Toulmin as well as Kienpointner (see Section 4.4.3). The Topos of Law in this particular context can also be translated in three different ways.

Topos of Law

1)

A:    Law or codified norm X prescribes/prohibits politico-administrative action A.

CR:    If law or codified norm X prescribes/prohibits politico-administrative action A, then A must be carried-out/prevented

C:    Thus, A must be carried-out/prevented.

Thus:

A: The 1987 Philippine Constitution and Republic Act No. 7722, also known as Higher Education Action of 1997, prescribe the basic rules and premises of the CHEd's policies on internationalization.

CR: If the 1987 Philippine Constitution and Republic Act No. 7722 prescribe the CHEd's internationalization policy, then this policy must be carried-out.

C: Thus, the policy must be carried-out.


2)

A: Law or codified norm X legitimizes A.

CR: If law or codified norm X legitimizes A, then A must be recognized as legitimate.

C: Thus, A is legitimate.


Thus:

A: The 1987 Philippine Constitution and Republic Act No. 7722 legitimize the power and functions of the CHEd to determine the internationalization policy of the higher education sector.

CR: If the 1987 Philippine Constitution and Republic Act No. 7722 legitimize the powers and functions of the CHEd, then the CHEd must be legitimate.

C: Thus, the CHEd is legitimate and has legitimate powers and functions in determining the internationalization policy of the higher education sector.


3)

A: The Constitution prescribes a framework for A.

CR: If the Constitution prescribes a framework for A, then A must be constitutional.

C: Thus, A must be constitutional.


Thus:

A: The 1987 Philippine Constitution sets the framework for the internationalization policy of the higher education sector.

CR: If the 1987 Philippine Constitution sets the framework for the policy, then the internationalization policy must be constitutional.

C: Thus, the internationalization policy is constitutional.


One could further claim, that if the policy is constitutional, then it must be implemented and carried out, or it is acceptable and valid. Lines 2 and 3 of the paragraph imply the Topos of Authority which can be formalized as follows:

Topos of Authority

A:     Authority X says that A has to be done.

CR:    If authority X says A has to be done, then A has to be done.

C:     Therefore, A has to be done.


A:     The CHEd as an official unit of the government takes into consideration the Philippine Government commitments to bilateral, multilateral, regional, and international agreements in higher education, including its trade as services, in its policy.

CR:    If the CHEd takes these government commitments in its policy formulation, these commitments must be carried-out.

C:     Thus, these commitments of the Philippine government must be carried-out.


In this first paragraph of the CMO, the CHEd is establishing not only its legitimacy, but also the legitimacy of the CMO itself. On the one hand, both the 1987 Philippine Constitution and Republic Act No. 7722 serve as sources of authority for the legitimate status of CHEd. On the other hand, they are also the sources of the fundamental premises for the policy. In this terse introduction to the policy text, the CHEd indicates the crucial role of the 1987 Philippine Constitution, the Higher Education Act of 1997, and the Philippine government's commitments to various agreements in higher education in formulating the internationalization policy of the country. Particularly, the Philippine Constitution, as a codified set of principles and practices in governing the state, becomes a very powerful argument for the design of the policy; through it, the CHEd can claim the normative rightness of the policy design and concepts. Further, the CHEd made its first allusion to the General Agreements on Trades and Services (GATS) in the fourth line by acknowledging the marketization or trade of higher education as services. Establishing legitimacy through the Topos of Law and the Topos of Authority is a feature of all of the policy documents examined for this study. Expressing commitments to laws and agreements, whether international, regional, or national, appears to be a standard in the genre of policy formulation in the Philippines.

### 5.2.2. Press releases (2012 to 2019)

Press releases are short texts similar to news stories that contain information about the organization issuing the releases. They are usually provided to journalists, newspapers, or broadcasting organizations for publication at those media outlets' discretion. The scope of information contained in press releases varies; it could inform about the issuer's activities in a matter-of-fact manner, the issuer's standpoints or opinions on particular topics, or provide

insights on the company/organization, such as annual reviews, or promote the issuer's activities.

Press releases or statements have both informational and promotional values, very often associated with persuasive communication and positive connotations about the issuer (Catennacio, 2008). However, with the spread of websites and the increasing use of social media platforms, the readership of press releases now includes the general public (Lassen, 2006; Catenaccio, 2008). The implications of this changing practice can be observed in the variations of press releases' format and structure, linguistic features, as well as in their communicative purposes or rhetorical objectives. From her genre analysis of press statements, Lassen (2006), argues that press releases cannot be categorized as a genre if only the functional criteria are invoked. In her observation, press releases are "a media-channel […], used as a vehicle to carry a variety of rhetorical objectives, and hence a variety of genres" (p. 506). On the other hand, Catenaccio (2008, p. 11) followed Fairclough who termed press releases as a hybrid genre. Hybridity in this sense refers to the mixture of genres found in a single text (Fairclough, 2003) that exemplifies the blurring of boundaries between discourses (Catenaccio, 2008, p. 11). In this research, I follow Fairclough (2003) who suggested the label *disembedded genre* to refer to genres that have been lifted out of the network of social practice where they originated or developed and recontextualized to be used in other networks of social practices. Thus, they become "available as a sort of 'social technology' which transcends both differences between networks of practices and differences of scale" (Fairclough, 2003, pp. 68-69). From the professional practice in the field of public relations that involved only the companies/organizations (as issuers) and the media, the use of press releases now transcends that social practice to include the general public whose geographical location is no longer confined to spatial boundaries. In the case of the CHEd, its press releases do not only serve to inform and promote, but also to persuade the readers of the value of its activities and convey certain ideas on particular issues. In this manner, its press releases become part of broader discourses in higher education.

### 5.2.2.1.    Format and structure

Since all the press release documents come from the CHEd's webpage, the text format is uniform in many cases. Several press releases also contain images. These images are embedded in the text and are located or positioned either on top or in the middle of the text. These official pictures or images depict high-ranking officials of the CHEd 'in action' during official engagements, such as signing of memoranda or moderating a discussion. As my analysis centers on the text or textual meaning of the press releases, I have not examined nor evaluated the usage of images in this context. However, I do acknowledge that images

contribute to the (re)construction of a discourse. For multimodal discourse analysis that include interpretation of images and other novel approaches beyond text analysis (see for example Kress & van Leeuwen, 2001).

### 5.2.3. Executive Order No. 285, series of 2000

Modelled on the U.S. American legal system, an Executive Order (EO) is a published directive signed by the President to manage the national government's operations. It is not legislation hence it does not require approval from Congress. The Congress cannot overturn an EO, but it can impede its implementation. Only an incumbent President can repeal, amend, or replace an existing EO. Although it is not a law, it has the "force of law" ("What Is an Executive Order?" 2020, para. 2).

### 5.2.3.1. Topics and audience

EO 285 regulates the admission and residence of foreign students in the Philippines. It defines who qualifies as a bona fide student, what an accredited higher education institution is, the process for visa application, the role of various government agencies in ensuring that the provisions of the EO are implemented, and the sanctions that may be imposed on foreign students in case of violation of immigration, or other, laws. It also establishes the Inter-Agency Committee on Foreign Students (IACFS) and appoints the CHEd as the Committee's chairperson. EO 285 superseded the following EOs: No. 423, signed in 1997, No. 188, signed in 1994, and No. 721, signed in 198. Aside from the CHEd, it addresses the following government agencies: Department of Foreign Affairs (DFA), Department of Education (DepEd),[17] Bureau of Immigration (BI), National Bureau of Investigation (NBI), and National Intelligence Coordinating Agency (NICA). The document is divided into the following sections:

- Heading indicating the origin of the document (Office of the President), and a handwritten number of the EO
- Title in its long or complete form
- Introduction which establishes the rationales and legitimacy of the EO
- Body of the order divided into sections and spelling out the actions to be taken to implement the EO.
- Signature of the issuing President and his Executive Secretary, including the date and place of signature

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[17] Formerly Department of Education Culture and Sports.

### 5.2.3.2.  Establishing legitimacy

In the case of Executive Order No. 285, and R.A. 114488 including its Explanatory Note, legitimacy does not need to be established linguistically. For one, the fact that the documents were issued by the President and the Congress, respectively, is the source of legitimacy. In both of these policy documents, the Topos of Law is articulated symbolically, for example through the use of the logo of the Congress and the seal of the Office of the President, stamps, as well as the signatures of the respective issuers. The Joint Memorandum No. 01 issued in 2017 derives its legitimacy from Executive Order No. 285. This difference in articulation of legitimacy illustrates the hierarchy between the Congress, the President, and the CHEd as policymakers. Whereas the CHEd needs to establish its legitimacy linguistically, the Congress and the President do not.

## 5.2.4.  Transnational Higher Education Act (R.A. 11448) including its Explanatory Note (House Bill 04565)

A Republic Act is a piece of legislation that serves as a basis for further policies and aims to carry out the principles of the Constitution ("Republic Acts," n.d.). It must first be approved by the Congress and then by the President before it can take effect. In its complete form, the title of R.A. 114488 reads: "An Act expanding access to educational services through the establishment and administration of Transnational Higher Education, and Appropriating funds therefo" [*sic*]. It is a landmark piece of legislation since it is the first that regulates the operations of TNE in the country. Amongst all the policy documents studied for this research, the R.A. 11448 and its accompanying explanatory notes were the most current, having been enacted only in July 2019. House Bill 04565 is the original bill submitted to Congress in 2016. It contains the explanatory notes to the proposed Transnational Higher Education Act of 2016. This proposal was later approved and signed by President R. Duterte and published as R.A. 11448. For sake of simplicity, House Bill 04565 will be referred to as Explanatory Notes to R.A. 11448 in this study.

### 5.2.4.1.  Topics and audience

R.A. 11448 addresses the CHEd, all higher education institutions interested in establishing TNE programs in the country, and other local and international stakeholders who have an interest in TNE. It is divided into sections and discusses the following topics:

- Heading indicating the origin of the document (Congress of the Philippines), the legislation period and session it was approved (17th Congress, 3rd Regular Session)
- Date and place it was created
- Title in its long or complete form

- Introduction in the form of a phrase indicating that the policy is enacted by the assembled Senate and House of Representatives
- Body of the order divided into sections and enumerating the policy rationales, definition of terms used, eligibility criteria for higher education institutions, quality assurance mechanisms, and the creation of the TNE Division in the CHEd
- Signature of the public officials authorized to sign a law and the sitting President, including the President's date of signature

## 5.3. Discourse strand: Marketization

In the policy documents issued in 1994 and 1997 on the regulation of entry of foreign students, the aim of making programs accessible to them is to raise the profile of the country's higher education system as a center of quality education in the Asia Pacific region. This is ironic because quality has been one of the most enduring discourses in the sector. Nevertheless, this aim was given another layer in CMO 01 from 2000 on the implementation of linkages and twinning programs. The goal of the policy paper was:

> […] to strengthen educational, cultural, social, economic, and political bonds between Philippine and foreign institutions of higher learning thereby fostering a vibrant exchange of cultures integral to a peaceful living within the global community (p. 1).

The above statement illustrates the policy rationale for linkages and twinning programs which rests on foreign policy ideas and a limited form of global citizenship. Although these ideas and the promotion of the higher education sector as a provider of quality education have not disappeared in the documents studied in this research, the idea of globalization of the higher education sector rooted in neoliberal values began to appear in 2008. However, this is not to claim that the CHED or the Philippine government only began to refer to the discourse on marketization in that particular year. On the contrary, as discussed in Chapter 3, marketization of the sector historically developed as a response to oppressive practices of the Spanish colonial government. The discourse strand on marketization exhibits 4 major topoi: the Topos of "Reality" emphasizes the inexorable effect of globalization; the Topos of Expert Opinion and the Topos of Opposites reframe the definition of IHE; and the Topos of Advantage or Usefulness of marketization of higher education.

## 5.3.1. Definition

The neoliberal ideology of a capitalist market permeates the higher education sector worldwide. Policy agendas are geared towards reforming the sector to behave in a market-like manner or into a bona-fide capitalist market (Marginson, 2013, p. 355). However, there is no

one higher education system that has achieved or even comes close to a full textbook-like capitalist market system, primarily because the nature and value of higher education are not compatible with the neoliberal market model (Jongbloed, 2003; Marginson, 2013). In this section, I do not intend to discuss the degree to which the Philippine higher education system follows the neoliberal market model. The focus here is on the ideologies that imprint on the discourse in the country. As Marginson (2013, p. 354) noted, it is instructive to view neoliberalism as a meta-narrative that promotes particular processes, practices and outcomes; a project that seeks "to make the world in its image rather than an achieved condition" (Clarke 2007, p. 240 cited from Marginson, 2013, p. 354). Rizvi and Lingard (2010) observe how the neoliberal discourse functions as a social imaginary that reinterprets education values, directs policies and practices, and determines what is conceivable as possibilities and futures (p. 79). Marginson (2013) adds that the neoliberal discourse has been taken into policy and regulation at two levels: the first level is the New Public Management (NPM), which reforms institutions into quasi-business firms or corporations. The second level is called the Neoliberal Market Mode (NMM) and it embodies full economic commercialization (p. 355). For purposes of clarity, I offer some definitions of marketization in higher education here. For Marginson (1999), it is:

> […] apparent in the growing role of private costs, in the increasing inequalities between the resources and status of education in different institutions, and in the varying experiences of 'consumption' within common systems. It can be recognised also in the growing role of competition between institutions, and in the plethora of corporate activity, such as marketing, business plans and variations in the product so as to optimise the economic 'bottom line' (p. 229).

The definition offered by Marginson transcends the activities of transnational education and includes the general and broader trends that mark the provision and 'consumption' of higher education, as well as their consequences, such as the competition and inequalities they produce. Jongbloed (2003), on the other hand, defines the concept in a narrower sense that is closer to the economic ideas of a market.

> Marketisation policies address the eight conditions (four on the side of the consumers; four on the side of the providers) that are essential to markets. The policies create the conditions for autonomous (i.e., self-steering) and accountable entities (i.e., students and providers) which decide for themselves on the basis of reliable information, freedom to choose and room to move (p. 133).

Marketization in this sense, is the introduction of market-type mechanisms for coordinating the national higher education sectors (Jongbloed, 2003, p. 110). It includes varying degrees of state interventions, with the aim to correct market failures and to ensure that resources are allocated efficiently. It emphasizes individual choice, individual entities (i.e. students, institutions), performance, competition, and deregulation (pp. 113-114). It is replete with ideas and activities that reflect the consumer-driven business sector, such as value for money, consumer choice, price-competition, franchising, marketing, or branding (Molesworth, Nixon & Scullion, 2009; Brown, 2015). The idea of marketization is linked to the processes of globalization and internationalization of higher education (see Maringe & Foskett, 2010).

### 5.3.2. Discourse topoi

The development of the private higher education sector in the Philippines is related to the ideas of education as a public good. It is beyond the scope of this study to reconstruct the genesis of the debates on this issue. However, it is important to note that in the context of the Philippines, the idea is entrenched in the constitution:

> SECTION 1. The State shall protect and promote the right of all citizens to quality education at all levels and shall take appropriate steps to make such education accessible to all (Phil. Const. art. XIV).

In the national debates on the K-12 reform, both contra and pro parties used this constitutional clause to lend authority to their arguments. In the higher education sector, where the debates were more subdued, the CHEd employed the above passage to emphasize the need for the K-12 reform and the concomitant transformations in the higher education sector, including internationalization. In addition, the government also recognizes the critical importance of private institutions in widening public access to tertiary education.

> SECTION 4. (1) The State recognizes the complementary roles of public and private institutions in the educational system and shall exercise reasonable supervision and regulation of all educational institutions (Phil. Const. art. XIV).

In both statements, the State is clearly the provider and regulator of education. Quality education is also conceived of as a human right of every Filipino citizen. The implications of these statements are evident in the country's high education sector structures and on the contentious partnership between the government, the CHEd, the public higher education sector, and private higher education institutions. The statement acknowledges that if the government is unable to provide the much-demanded service, the people must have an option

to avail that service from private providers. This logic is used by private institutions to legitimize their operations, and this is not rejected by public institutions. Similar to many countries where critical scholars characterize public financing as problematic, the discussions in the Philippines on higher education as a public good are based on economic arguments (see Canlas, 1987; cf. Marginson, 2018 and Williams, 2016 on definitions). Moreover, the discourse on public good is also related to the discourse on democracy; on individual freedom to make life choices. However, there are ramifications to the economic approach, particularly in regard to the values and missions of higher education institutions (Marginson, 2014; Williams, 2016). These discourse strands indicate entanglements that make up the more complex discourse at the societal level.

### 5.3.2.1.     Topos of "Reality"

The Topos of "Reality" is challenging to define because the term, reality, is complex and contested. The Cambridge Dictionary defines it as a fact, as the actual state of things rather than imagined (Cambridge, n.d.). In their description of the Topos of "Reality," Reisigl and Wodak (2001) use the term to refer to social, economic, and political conditions that require a specific action (p. 79). In this study, the quotation marks indicate fundamental problems inherent in the term "reality." The notion of "reality" is contrary to the standard lexical definition cited above and slightly differs from Reisigl and Wodak's usage. Here, the Topos of "Reality" specifically refers to a version of a social reality that is constituted by and through discourse. Social constructionism underlies its ontology. "Reality" must be understood as socially constructed reality in the tradition of Berger and Luckman (see Section 4.1.1.). In this sense, reality is discursively constructed by policy agents to justify a specific policy logic that instructs a specific set of actions (*Handlungslogik*). The topos employed in the following statements taken from CMO 02 is the Topos of "Reality," which is considered as a tautological argumentation scheme (Reisigl & Wodak, 2001, p. 79).

A:      Reality is as it is.
CR:    If reality is as it is, a specific action / decision should be performed / made.
C:      Thus, a specific action / decision should be performed / made.

The scheme can be translated as follows:
A:      Reality of globalization and trade agreements is at is.
CR:    If the reality of globalization and trade agreements is as it is, the Philippines need to internationalize its higher education sector.
C:      Thus, the Philippines needs to internationalize its higher education sector.

The first policy that alludes to marketization is CMO 62 (2016), which enumerates the policies, standards, and guidelines for Transnational Education.

> The Commission on Higher Education recognizes that globalization, changing foreign policies, and liberalization of trade in goods and services worldwide have created a climate for borderless teaching and learning as well as expanded opportunities for transnational education (p. 1).

> The Commission recognizes the Philippine commitments to bilateral, regional and multilateral trade agreements such as the General Agreement on Trade in Services and the ASEAN Framework [Agreement] on Services (p. 2).

These paragraphs form part of the general principles for Transnational Education (TNE). The British Council defines TNE as "a component of the wider phenomenon of the internationalisation of education" (2013). Although there are different models of delivery and policy approaches to TNE, it is basically concerned with mobility of providers and programs (see OECD/UNESCO, 2005). McBurnie and Ziguras (2007) argue that TNE is the "evidence of the invisible hand of the market at work" (p. 1) because the vast majority of TNE programs are funded wholly by student tuition fees. Thus, it borrows market-driven ideologies and policies. TNE operates as a business, competing with local HEIs particularly in disciplines or study areas where demand cannot be met adequately. In the Philippines, TNE operations are limited to authorized local HEIs and are thus highly regulated by the CHEd. This means that the CHEd acknowledges the changing social, political, and economic realities brought about by globalization and marketization, thus it needs to engage with them. The Philippine government expresses the same line of argument in R.A. 11448.

> The State recognizes that rapid development brought about by globalization, including liberalization of trade in goods and services and expanding use of information and communication technologies, have created a climate for borderless teaching and learning (2019, p. 2).

In the Explanatory Notes to House Bill 04565 (2016), the policymaker who proposed the bill underlined the urgency of responding to the demands of globalization by "opening" the Philippine higher education system:

> In the age of globalization, there is a need to adapt to continually evolving international trends and standards. The methods and institutions that are the giants of the industries

will eventually falter if they will not be able to keep up with the ever changing [*sic*] demands of the world (p. 1.).

The above statements stress how the "reality" of globalization serves as the broader context to formulating policies on TNE. This argumentation becomes an axiom, as will be evident in the next discussions.

### 5.3.2.2.        Topos of Expert Opinion

In CMO 55, the discourse strand in marketization is evident in the conceptualization of internationalization. In Article I, which informs the policy background and context, the CHED's conceptual point of departure is the description and explanation of how internationalization of the higher education sector has developed. It uses several strategies for its argumentation.

> International initiatives in higher education have been driven in the past mainly by academic, social, cultural, and political factors.[1] Internationalization of higher education as traditionally practiced involving cooperation among universities to advance knowledge frontiers and promote social and cultural diversity was referred to as International Education. As a concept, it was confined to a series of "fragmented" and rather "unrelated" international activities in higher education: study abroad, foreign student advising, student and staff exchange, development education, and area studies (p. 1).

First, the CHEd refers to the literature written by Knight and de Wit in 1999 and by Scott in 1998. The superscripted number 1 indicates this reference as a footnote. Given that Scott, Knight, and de Wit are renowned scholars who have published extensively in the field of international higher education, one would assume that the statement presented above is true. Granted that the names indeed refer to Peter Scott (University College London), Jane Knight (Ontario Institute of Studies in Education, University of Toronto), and Hans de Wit (Boston College Lynch School of Education), the CHEd utilizes the argumentation from expert opinion expressed as follows (Walton et al., 2008, p. 244):

A:      E is an expert in domain D

CR:    If E asserts that A is known to be true and A is within D, then A may plausibly be taken to be true.

C:      Therefore, A may plausibly be taken to be true

Therefore:

A: The experts (Knight, de Wit, and Scott) are experts in Internationalization of Higher Education.

CR: If the experts asserted that "International initiatives in higher education have been driven in the past mainly by academic, social, cultural, and political factors"; and these are within the field of Internationalization of Higher Education, then the experts' assertions may be plausible.

C: Thus, the assertion that "international initiatives in higher education have been driven in the past mainly by academic, social, cultural, and political factors," may plausibly be taken to be true.

Formally, the argumentation presented above is valid. Since the CHEd does not provide complete information on the literature it refers to, it is very difficult to trace and critically evaluate the claims. One could interpret the CHEd's practice in many ways. In this case, I follow the Principle of Charity (Walton, 2013) and give the CHEd the benefit of the doubt to construe this as an error of omission, or simply a standard practice in policy formulation. In the Explanatory Notes, the experts referred to by policymakers are not individual persons, but developed countries.[18] For example:

> The developed countries are showing the way to a strong and stable economy and the Philippines can very much learn from their best practices. What better way to learn the best practices of developed countries than by exposing ourselves to the methods and techniques of their educational system and learn from their classrooms from a first-hand perspective (p. 1).

The above statement is closely linked to the Topos of "Reality" – of the Philippines lagging behind developed countries – and acknowledges how the policymakers perceive the situation or location of the Philippines in the global sphere. It also equates international standards to Western standards or standards of higher education institutions in developed countries.

### 5.3.2.3. Topos of Opposites

The argumentation scheme based on the Topos of Opposites is expressed through the following annotation (Walton et al., 2008, p. 107):

A: X has the property Y.

CR: If X has the property Y, then X cannot have the opposite property YZ at the same time and in the same context.

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[18] I recognize the difficulty of using the terms developed and developing countries to describe countries situated in the West and in the Global South.

C:    X has the property Y, or X cannot be YZ at the same time and in the same context.

This is translated as follows:

A:    International Education (IE) activities are fragmented and unrelated.

CR:    If IE activities are fragmented and unrelated, then IE cannot have properties of Internationalization of Higher education, which is comprehensive and organized, at the same time and in the same context.

C:    IE is not the same as IHE.

In the first two lines of the phrase cited above, the CHEd used the passive voice and the simple perfect tense in describing the drivers of internationalization initiatives. These two grammatical aspects are relevant in the analysis, because they stress the following: 1) the relevance of social, cultural, and political factors in driving internationalization; 2) the irrelevance of the actor/agent by using the passive voice; and 3) the timeframe of the relevance of these factors through the use of present perfect tense which emphasizes an activity or event that is finished in the recent past, which also indicates a discourse deixis indicating a location in the past. Note the absence of economic factors in this statement. By omitting it, the CHEd implied that economic factors were irrelevant in the past. Thus, in these first two lines, the CHEd seems to assert that social, cultural, and political factors are, for the present, no longer relevant as drivers of internationalization activities.

From the second to the fifth lines, the CHEd makes three further claims: 1) internationalization of higher education was subsumed under the more general term of international education; 2) the traditional practice of internationalization involved cooperation between universities; and 3) such institutional cooperation aims to advance knowledge frontiers and promote social and cultural diversity. In this case, the use of the past tense in the phrases *traditionally practiced* and *was referred to* act as language devices that, again, emphasize the past relevance of these practices. Also, note that the compound noun *knowledge frontiers* indicates the search for novel or new knowledge, or pushing the boundaries/limits of scientific knowledge. Thus, the exploration of the limits of knowledge and the promotion of social and cultural diversity through cooperation between universities are two altruistic motives that drove international education and, by implication, internationalization of higher education. The CHEd continued utilizing the argument of definition by defining the concept of international education negatively as *fragmented* and *unrelated*; in other words, international activities are loose and unorganized, although the quotation marks and the insertion of the word *rather* also implies a mitigated articulation. Nevertheless, such a construction of the concept of international education corroborates the negative characterizations.

With the advent of globalization and rapid changes in information and communication technology - the concept of internationalization is distinguished from International Education by the comprehensiveness of the framework and the inclusion of different forms, providers and products of cross-border education apart from internationalization initiatives at home that entails incorporation of international dimensions in the curriculum and the learning process (CMO 55, p. 1).

The CHEd defined internationalization as a comprehensive framework and thus assigned a positive value to it; the persuasive definition casts a positive light on the concept vis-à-vis the fragmented and unrelated activities of international education. Internationalization, from this purview, is a process that has a wide-ranging scope in terms of content, agents, and stakeholders, and includes TNE, cross-border education, and dimensions of internationalization-at-home (IaH). On the other hand, International Education is defined as a state or condition. Thus, the CHEd alluded to the marketization of higher education as a component of its definition of internationalization. In these first two paragraphs discussed, the CHEd used the Topos of Opposites to demarcate the concept of international education from the concept of internationalization of higher education.

The first two paragraphs of CMO 55 as illustrated above demonstrate an attempt at framing the relevance of internationalization by differentiating it from or placing it as a dichotomy of international education. One could infer the goal of emphasizing the difference; that is, internationalization is desirable, as opposed to International Education which is no longer relevant. In paragraph 2, the noun *advent* signals a coming into being, or the beginning of an event. By this, one can interpret that the concept or idea of international-mindedness in education shifted when the process of globalization and the rapid changes in information and communication technology (ICT) began. Another related interpretation is that both phenomena – globalization and ICT development – have a distinct chronology or timeline.

### 5.3.2.4.    Topos of Advantage / Usefulness

This topos is expressed as follows: if an action under a specific relevant point of view will be useful, then one should perform it.

A:      Internationalization is advantageous or useful to us (i.e. it will build an informed and engaged citizenry, a more inclusive and participative society, and improve lives through its positive impact on the social and economic landscape).

CR:     If internationalization is advantageous or useful to us, then it should be carried out / implemented.

C:       Thus, internationalization must be implemented.

The context and general principles of CMO 33 published in 2013 on University Mobility in Asia and the Pacific (UMAP) Credit Transfer Scheme (UCTS) begins with this phrase:

> The CHED recognizes the developments brought about by internationalization of Philippine higher education in response to globalization and liberalization of trade in goods and services worldwide with expanded opportunities for student mobility and cross-border employability (p. 1).

As with CMO 62 on TNE, CMO 33 clearly refers to GATS, reiterating and stressing the opportunities it presents, particularly its positive impact on mobility of individuals. Here, both student mobility and worker / labor mobility are presented as advantageous or desirable, thus employing the Topos of Advantage. The following paragraphs are substantial parts of the CHEd's conceptualization. They provide the key ideas that, together with the arguments discussed above, shape the policy direction and content.

> Internationalization has increasingly become a key feature of higher education in the global era, in light of the freer flow of students and workers within and across regional economies and the necessity of international linkages in the generation of productive knowledge, innovation and technology. In particular, the integration of ASEAN Member States enlarges the economic space for its members by expanding markets for goods and services. The opportunities and challenges opened by this integration are the backdrop of the Philippines' comprehensive and far-reaching policy reforms that include the internationalization of higher education (CMO 55, p. 1).

In the first two lines, the CHEd made a factual claim by observing the growing relevance of internationalization of the higher education sector in the global era.  In the above statement, the CHEd's use of the Topos of Advantage or Usefulness is visible, particularly the subtype 'pro bono publico' which is translated as "to the advantage of us" or for the public good. That is: "if an action under a specific relevant point of view will be useful, then one should perform it" (Reisigl & Wodak, 2001, p. 75).

A:      Action X is advantageous or useful to us / for the public.

CR:     If action X is advantageous or useful to us / for the public, then it should be carried out / implemented.

C:      Thus, action X must be carried out / implemented.

This could be translated in two ways:

A:      Internationalization (or: mobility) is advantageous or useful to us.

CR:     If internationalization (or: mobility) is advantageous or useful to us, then it should be carried out / implemented.

C:      Thus, internationalization (or: mobility) must be implemented.

The same scheme can be applied when emphasizing the assumed positive link between national development and knowledge production, innovation, and technology. In other words, mobility and knowledge production could be interpreted as the warrants or justifications of internationalization. The CHEd's argumentation corroborates the claims it made in the previous paragraphs, further emphasizing the salient changes that have been occurring in the conceptualization and practice of internationalization in higher education. Furthermore, the CHEd hinted at two major issues that are crucial to understanding the policy content: the idea of labor migration in the phrase *free flow of students and workers* and the concept of national borders and territory in the phrase *within and across regional economies*. R.A. 11448 (2019) echoes the same ideas.

> In this light, the State shall endeavor to modernize the Philippine higher education sector, and bring international quality standards and expertise into the country, with a view to making a flow of talented students, faculty, and staff and improving the country's human resource base (p. 2)

In the above statement, ideas about international standards, modernization, and human capital are conflated to produce a raison d'être for internationalization and "opening" of the Philippine higher education to foreign students and staff.

In the last paragraph of Article I of CMO 55 (2016), the CHEd's policy frames become clearer. They include ASEAN economic integration and the Philippine government's national plans, as well as mobility of labor workers, students, and ideas. The CHEd stresses the importance of the policy frames through the adjectives *imperative*, *vigorous,* and *integral*; positive descriptors that enhance the illocutionary force as well as the value of the ideas being conveyed:

Against the backdrop of the ASEAN Economic Community, the country's national plans, the imperatives of labor and student mobility as well as more vigorous academic exchanges, internationalization is integral to the Commission on Higher Education's reform. The following internationalization strategies have been identified:

a) Enhanced implementation of the quality assurance framework and the quality, effectiveness and efficiency of Philippine higher education institutions (HEIs);

b) Systematic facilitation of country-wide and regional mobility and market-access of students, faculty and staff; and

c) Strengthening of appropriate international linkages of HEIS for a sustainable Philippine international higher education sector (pp. 1-2).

In general, the CHEd's internationalization policy focuses on three main strategies. These are improving the quality of the Philippine higher education, facilitation of mobility and market-access, and improving international linkages. As discussed earlier, these strategies are major elements that underpin marketization: specifically, market competition and competition for public funding have given rise to the quality assurance regime, the need to intensify strategic linkages and external partnerships, and to provide opportunities for student mobility (Hemsley-Brown & Oplatka, 2010). Regarding interdiscursivity, the CHEd borrows, as observed throughout Article I, from the discourse of marketization of higher education as a tradeable service and product. The adjective *appropriate* functions as a qualifier that heightens the importance of international linkages.

The CHEd views GATS and the concomitant marketization of higher education as advantageous or useful for the Philippine higher education sector and students, primarily because it expands opportunities for the mobility of individuals by opening up market access to Filipinos; it is expected to increase the quality of higher education, as well as facilitate knowledge creation and production, and therefore improve the country's competitiveness. In providing a definition for cross-border education, the CHEd describes it as follows:

1. Cross-border education can involve mobility of students, faculty and researchers; programs, and institutions. Based on the UNESCO 2005 Guidelines, activities under cross-border education include:
    a. Student/faculty/researcher mobility: this includes (a) movement of students to study in a foreign country; (b) faculty exchanges between institutions located in different countries; (c) research fellowships/collaboration involving visits of scholars to country(ies) of collaborating institutions; (d) foreign language study; (e) building international perspectives through

conferences and networks involving travel of learners, faculty, or researchers.

b. Program mobility: this includes (a) twinning programs; (b) academic franchising; (c) program articulation programs; (d) joint/double awards;

c. Institutional mobility: this consists of commercial presence of foreign universities in another country in the form of (a) branch campuses; (b) offshore institutions; and (c) international institutions (CMO 55, 2016, p. 3).

This section suggests intertextuality with the UNESCO Guidelines from 2005. As with the previous literature, the CHEd does not provide specific details about the text. Nevertheless, I take UNESCO's *Guidelines for Quality Provision in Cross-border Higher Education* (2005) as my reference for this section.[19] In the first line, the modal verb *can* is important in the interpretation because c*an* denotes a general statement about possibilities. In other words, the text seems to indicate that mobility (of people, programs, and institutions) is possible, but is not a precondition for cross-border education to transpire. The terms *offshore* and *commercial presence* pertain to WTO's vocabulary, thus showing an intertextuality with the GATS. These terms particularly refer to the third mode of provision and consumption of international trade in services. What is not clear is the difference between the forms of such commercial presence mentioned in the policy document, namely the branch campus, offshore institutions, and international institutions. At any rate, the first two forms clearly show an interdiscursivity with market orientation. Both are so-called 'modes of entry' of an HEI into a foreign market promoted by GATS. The causal relationship between marketization and increasing competitiveness of the country's human resources becomes clearer in the other sections of CMO 55. The following statements underline the specific background and context of the Philippines that underpin the arguments and rationales for implementing the internationalization policy and strategies in the country. As indicated, the primary goal of the policy is to improve the quality of tertiary education in the country. Basically, this refers to the common conceptual definition of the term internationalization. The basic premises of the CHEd's policy are based on human capital theories that assume a causal relationship between education (training, schooling), productivity (employability, flexibility, increased income) and economic growth (Tan, 2014).

> The internationalization policy for Philippine higher education has the primary goal of improving the quality of education that would translate into the development of a competitive human resource capital that can adapt to shifting demands in the regional and global environment to support and sustain the county's economic growth. Internationalization is also envisaged to stimulate innovation and technological

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[19] This is the publication I could find in UNESCO's electronic databank that is closest to the text cited by CHEd.

advancement resulting from a wider interaction of knowledge networks (CMO 55, 2016, p. 6).

This train of thought indicates that internationalization contributes to economic development. The phrases *competitive human resource capital*, *employable skills* and *adaptable mindsets* succinctly summarize this idea. The Philippines is not unique in this line of argumentation; on the contrary, it shares the neoliberal and economic perspectives promoted by transnational organizations such as the WB, OECD, ASEAN, and UNESCO, that underpin many national education policies around the world.

> The higher education internationalization strategy shall be directed towards supporting the national development goals, reflected in the Philippine Development Plan (PDP) and the CHED's medium-term Strategic Plan. In the medium-term, higher education quality improvements resulting from internationalization would be manifested through an increasing number of graduates who possess employable skills both in the domestic and international labor markets, global perspectives, and adaptable mindsets. Over the long-term, the strategy is to be able to continuously upgrade and sustain the quality of Philippine HEIS through academic and knowledge transfer outcomes that would result in improved quality assurance, accreditation status and educational standards comparable with international levels (CMO 55, 2016, p. 6).

The CHEd also assumes that internationalization will support building an informed citizenry, a more inclusive and participative society, and it will improve people's lives. This leads to the claim that internationalization will have a positive impact on the social and economic contours of the country, and thus indicates the Topos of Advantage or Usefulness.

A:  Internationalization is advantageous or useful to us (i.e. it will build informed and critical citizenry, more inclusive and participative society, and improve lives through its positive impact on the social and economic landscape).

CR:  If internationalization is advantageous or useful to us, then it must be carried out / implemented.

C:  Thus, internationalization must be implemented.

Another example from CMO 55 can be found in Article 4, Section 6, where the CHEd enumerates its strategy for pursuing internationalization. One of these strategies is to "uphold the country's reputation as a center of higher education in identified niches/programs of excellence (p. 6). That is, upholding the reputation of the country's higher education system is

limited to niche programs. That is, it excludes programs that are outside of the niche segment. Usage of the term *niche* usually occurs in the context of marketing, business/commerce, or employment position, while programs of excellence is one of the CHEd's flagship measures to sustain or develop programs which are deemed crucial to national development. In other words, niche programs are expected to contribute to national development. According to Milla (2019), the CHEd considers the following as niche and priority program areas:

- Transportation Engineering
- Transportation Studies
- Ethnological Landscape Architecture
- Cyber Security
- Data Science
- Digital Innovation and Creativity
- Agri-technology and Post-harvest Processing
- Maritime Affairs and Diplomacy
- Naval Architecture
- Conflict and Development
- Demography and Population Studies
- Alternative Learning System/Distance Education
- Adult Education
- Education Policy
- International Relations

These again emphasize workforce development in the context of globalization, and thus also allude to the global labor market. Furthermore, in enumerating the rationale for the internationalization policy, the CHEd asserted that internationalization *confers intrinsic benefits to participants*. These benefits include: developing students' flexibility and adaptability in a global environment, intercultural competencies, and competitiveness in labor markets; creating international curricula; strengthening academic linkages; improving quality of HEIs through knowledge transfer; and improving foreign relations (CMO 55, 2016, pp. 6-7). The CHEd anthropomorphizes internationalization by indicating that it confers its intrinsic benefits to participants. The assumed benefits are interdiscursively linked with notions of marketization, wherein higher education becomes an instrument of economic goals (Lipman, 2015), particularly with the use of the term knowledge/technology transfer. The CHEd uses this terminology repeatedly in relation to outcomes of academic collaboration and linkages. The same lines of argument are present in the CHEd's press releases. These discourse fragments also demonstrate enmeshment with the discourse on quality and nation/national development.

One observable difference, though, from the CMOs is how the concept of individual competitiveness and labor migration as direct outcomes of internationalization become more pronounced in the press releases. One way to explain this is that the press releases often refer to speeches by politicians and CHEd representatives who address a different target audience during the speeches delivered.

> In his remarks, Dr. De Vera mentioned that the primary goal of internationalization is improving the quality of Higher Education that would translate to the development of a more competitive human resource to sustain increased economic development (CHEd PR, 2018a, para. 3).

> "We, in the Commission on Higher Education (CHED), encourage Filipinos to study abroad because we want Filipino students to be competitive and acquire new ideas and strategies, expand their cultural and intellectual horizons, and improve their job prospects," (CHEd PR, 2018a, para. 1).

> "It is clear that for every Filipino who leaves for abroad, his or her worldview automatically changes, as they learn new cultures, as they work with students of different nationalities, but more importantly, as they test themselves among the best in the world. And when they come back, they are never the same again," said De Vera (CHEd PR, 2018a, para. 4).

These statements were delivered during the inauguration of the European Higher Education Fair (EHEF) in 2018. They intend to show the CHEd's commitment to the internationalization of Philippine Higher Education. Basically, they also employ the Topos of Advantage or Usefulness discussed previously, emphasizing the desirability of internationalization for national development and of mobility for individual success.

A:     Filipinos who study abroad will become competitive, acquire new ideas and strategies, expand their cultural and intellectual horizons, and improve their job prospects

CR:     If Filipinos study abroad, then beneficial consequences (i.e. competitiveness, acquisition of new ideas and strategies, expansion of horizons and improvement of job prospects) will occur.

C:     Thus, Filipinos must study abroad.

and

A1:     Filipinos who go abroad will have their worldviews changed automatically

A2:     Learning new cultures, working with students of different nationalities, and testing oneself among the best in the world will change one's worldviews.

A3:     Changing one's worldview will change one's self

CR:     If Filipinos go abroad, then beneficial consequences (i.e. changing worldviews and one's self) will occur.

C:      Thus, Filipinos must go abroad.

As Walton (1995) explains, causal argumentation or argumentation from consequences is a type of reasoning commonly used to either support or undermine a course of action by citing the good or bad consequences of the said action (pp. 71-76). This is precisely what is evident in the above statements spoken by the CHEd's Chairperson. On the one hand, it is only logical, and thus expected, that the Chairperson will speak of the benefits of internationalization in support of the CHEd's policy and the government's agenda. On the other hand, the Chairperson is also appealing to the students and the people addressed in the speech, thus influencing public opinion about internationalization.

### 5.3.3. Summary

The argumentation schemes or topoi discussed in this section help to deconstruct how the CHEd promotes the ideas of marketization through internationalization. Specifically, the CHEd employs several topoi to legitimize its position as expressed in its policy and strategies. The Topos of "Reality" emphasizes that marketization in the form of internationalization is the inevitable reality that the sector faces and that it requires further action at the national level. The Topos of Expert Opinion, Topos of Opposites, and the Topos of Advantage create a definition of internationalization that is market-oriented; this definition underlines the benefits of the internationalization activities, particularly mobility of individuals. The topos of positive cause or consequence, in other words the Topos of Advantage / Usefulness, links the assumed benefits of internationalization for individuals to the economic and societal level as positive and direct consequences of a market-oriented internationalization. Two interrelated ideas that imprint on the discourse strand on marketization stand out: mobility of individuals (both for study and for employment / work) and competitiveness.

Figure 10:  Topoi embedded in the discourse strand on Marketization

| Marketization | | |
|---|---|---|
| | Topos of "Reality" | Globalization and marketization is a reality. |
| | Topos of Expert Opinion | According to experts, the modern concept of internationalization of higher education now relates to marketization. |
| | Topos of Opposites | Economic imperatives drive internationalization (instead of social and cultural understanding). |
| | Topos of Advantage / Usefulness | Internationalization confers benefits to the country, HEIs, and individuals. |

## 5.4.    Discourse strand: Quality and Quality Assurance

The discourse strand on quality is one of the major and enduring topics in the Philippine education system. Dumlao-Valisno, former Secretary of Education, conducted one of the most comprehensive appraisals of the reforms initiated and implemented under the five Philippine presidents she served from 1965 to 2010 (2012). Her book's title, *The Nation's Journey to Greatness,* succinctly summarizes the configurations of the metadiscourse about Philippine education system. Embedded in the 'nation's journey to greatness' is the discourse strand of quality, so much so that Dumlao-Valisno hoped to contribute to "*flame the enduring passion to improve the quality of Philippine education,*" so that the country could regain its once leading position in education in Asia (Dumlao-Valisno, 2012, p. 2 & p. 10; my emphasis). It also signals that quality is an integral element of the discursive and social practices in Philippine education, and as such, is entangled with other discourses and practices, within and outside the field. According to Dumlao-Valisno, the country's education system has been "rocked continuously by the fault lines or pressures points, resulting in tremendous and steady decline of the quality of Philippine education at all levels" (2012, p. 10). In other words, these 'fault lines' are the various factors, both internal and external to the country, that trigger(ed) downward shifts in the quality of education (p. 3). Five overlapping topoi characterize the discourse strand on quality. These are: the Topos of Burden that points to the deficiencies in Philippine higher education system; the Topos of Consequence, or the positive impact of quality improvements and quality assurance in the internationalization of higher education; the Topos of Regulation,

the Topos of Law, the and topos of Respnsibility which legitimize the role of the CHEd and its IHE strategy.

### 5.4.1. Definition

On a global scale, quality is one of the key concepts that has marked the discourse in higher education since the 1990s (Skolnik, 2010). Fundamental changes in the higher education sector, such as massification, marketization, commodification of knowledge, globalization, and internationalization have contributed to what Newton (2010, p. 51) terms the *quality revolution,* bringing about immense developments in the management of higher education institutions (Harvey & Williams, 2010, p. 4; my emphasis). Likewise, Milliken and Colohan (2004) argue that the quality assurance movement in higher education is embedded in the New Public Managerialism approach to managing public services (see also Morley, 2003; Marginson, 2013).

As with many concepts, the idea of quality is nebulous and contested. At the most rudimentary level, quality requires delineating what is good and worthwhile. Defining quality means defining some form of standards or thresholds from which one could make sound judgment of characteristics or features of something. However, it raises further questions, such as: who can make such a judgement? What is a sound judgement? What characteristics or features come into question? Who defines what the standards are and how? These questions illustrate the nature of quality; that quality is a relative and value-laden concept (Harvey & Green, 1993) and its various meanings are strongly linked to perceptions about how outcomes of higher education ought to be (Tam, 2001). Quality could be examined from diverse perspectives, using various paradigms, models, approaches, and philosophies, focusing on different aspects as well as on international/transnational issues (Harvey & Green, 1993). Thus, the literature on quality in higher education abounds, albeit much of it focuses on managerial accounts of quality development and the institutionalization of internal quality assurance management as a response to the internal and external environments of the academia (Elken & Stensaker, 2018, p. 189). Morley (2003) traces the idea of quality assurance in higher education to the Total Quality Management movement, widely known as TQM, that began in the Japanese car manufacturing industry in the 1950s. It is based on the Japanese management philosophy called *Kaizen* which is literally translated as continuous improvement. In the workplace context, this means the process of continuous improvement involving everyone in the company, from top to bottom (Imai, 1986). On the other hand, the *Kaizen* movement in Japan was inspired by the ideas of scientific management, particularly those that focused on standardization (Taylorism) and efficacy in mass production through assembly lines (Fordism) which developed in the United States and became widespread after WWII (Sonobe, 2018). Morley

(2003) argues that "such policy borrowing or technology transfer has meant that mindsets and dispositions have been imported as well as models for measurement and evaluation" (p. 13). Thus, the transfer of the approach from the manufacturing industry to education indicated a shift not only in the discourse about education but in the values as well. Therefore, discursive practices on quality in education are strongly linked to the discursive practices in the business industry. Idrus (2003) argues that such borrowing is highly problematic since the ideas are primarily couched in market/business/production theories. Harvey (1995) as well as Harvey and Williams (2010) have also critiqued the use of business-based models because they fail to address fundamental issues that are particular to the context of education.

### 5.4.1.1.    Quality

Harvey and Green (1993) provide the most commonly used definition of quality in the context of higher education in the UK: quality as exceptional, fitness for purpose, perfection or consistency, qualitative transformation, or as value for money. Through the years, these definitions have provided the conceptual framework for examining quality in higher education across the globe. For a slightly different classification of quality and its related concepts, see Vlăsceanu, Grünberg, and Pârlea (2007).

### 5.4.1.1.1.  Quality as exceptional

According to Harvey and Green (1993), the concept of quality has been traditionally associated with the notion of distinctiveness, of something special, exclusive, or high class. It implies an elitist view of quality; that quality is unattainable for many or only accessible to a limited group. Quality is determined by the reputation of the institution and the credentials they issue confer status or prestige on the holder. It is thus not determined through assessment, rather it is based on the assumption that the exclusivity or inaccessibility of education is an indicator of quality (Harvey & Knight, 1996, p. 3). As such, this notion of quality does not provide a clear definition that can be used for evaluation and assessment. The second characteristic of exceptional quality is similar to the traditional notion discussed above. However, it eschews the apodictic nature of the traditional notion by identifying the components of excellence, while, at the same time, ensuring that excellence is almost unattainable or is only achievable in limited circumstances (Harvey & Green, 1993). In this sense, excellence is by nature linked to inputs and outputs; that is, a higher education institution that takes in the best students and provides the best human and physical resources (e.g. professors, laboratories, and libraries) will produce excellent results regardless of the learning process. There is a mutual link between resources and reputation: the level of resources endorses reputation, and a good reputation attracts resources (Harvey & Knight, 1996, p. 3). Thus, quality output is assumed to be a direct result of quality input. Harvey and Knight (1996) further argue that the "notion of centres of

excellence in higher education is welded to this view of exceptional quality" (p. 3). The third notion of quality as exceptional suggests that a 'product' has passed minimum standards or thresholds set by a monitoring body or organization. The benchmarks vary and are subject to negotiations in light of existing circumstances. In this regard, meeting or exceeding the standards is assumed to be an indicator of quality. A product that demonstrates features higher than the minimum requirements is considered to be a higher quality product (Harvey & Knight, 1996, p. 3). League tables or rankings are examples of such a notion of quality.

### 5.4.1.1.2. Quality as fitness for purpose

The notion of fitness for purpose is far from the idea of quality as exceptional because here, quality is only defined and measured in relation to the purpose of the product or service. In other words, products and services are of quality if they fulfill the purposes they have been designed for. To overcome the arbitrary nature of this definition, Harvey and Knight (1996, p. 5) further define fitness for purpose in regards to two questions: Whose purpose? And how is fitness assessed? As follows, they offer two approaches for answering these questions and thus defining quality: 1) fitting the customer specification or meeting the customer requirements, and 2) mission-based fitness for purpose. The first approach puts the onus on the customer, while the second approach puts the emphasis on the provider. The latter has found application in the context of education. For example, purposes are usually articulated in institutional mission and vision statements of higher education institutions. The idea of a mission-led assessment and judgement of quality has become a significant element of quality assurance models that dominate in many countries. A convergence of both views (the customer-driven and the mission-driven), Harvey and Knight (1996, p. 6) further state, would result in customer satisfaction. In higher education, this means that institutions must demonstrate a responsiveness to the expectations of their stakeholders. However, it also implies that the voices of stakeholders are given consideration in determining the mission of the institution, something that is very challenging in practice (Harvey & Knight, 1996, pp. 5-6).

In a slightly different manner, Vlăsceanu et al. (2007) define fitness for purpose as conformance to standards defined by, for example, a quality assurance body or accreditation body. This approach emphasizes the efficiency of institutional or program processes in fulfilling stated objectives and mission. On the other hand, quality as fitness of purpose focuses on the achievement of objectives and missions without ensuring the fitness of the processes themselves in relation to external standards (p. 46).

### 5.4.1.1.3.  Quality as consistency or perfection

The idea of quality as consistency or perfection is encapsulated in two further strands: zero defects or errors and getting it right the first time. Under these maxims, quality means conformance to a set of specifications. "Excellence thus becomes 'perfection' as measured by the absence of defects," and embodies prevention rather than inspection or control (Harvey & Knight, 1996, p. 4). Quality culture is thus a result of establishing procedures that produce consistent results.

### 5.4.1.1.4.  Quality as value for money

The idea of quality as value for money is directly linked to effectiveness and efficiency, as well as accountability. It expresses a market view of quality operationalized and legitimized through the use of performance indicators and league tables, which aims to effect change through pseudo-market competition (Harvey & Knight, 1996, p. 7). That is, quality has become a means for universities to distinguish themselves on the national and international market. The concept of value for money also views students as consumers who are able to decide whether or not the education and credentials they acquire and the service they receive are worth their investment. It shifts the view of education as a product that one buys, rather than as a learning and development process (Morley, 2003).

### 5.4.1.1.5.  Quality as transformation

Quality as transformation refers to a substantial qualitative change in the participants of the educative process. Transformation here has two dimensions: empowerment and enhancement. On one hand, it relates to the enhancement of knowledge, skills, and competencies in a specific domain that will effect changes in the students. Empowerment, on the other hand, means a radical reappraisal of higher education to ensure that learners are able to attain the knowledge and skills to influence their own transformation through critical thinking and self-reflection. This is underpinned by the authors' understanding of the students as participants of the learning process, and of education as a participative process; thus "Education is not a service *for* a customer (much less a product to be consumed) but an ongoing process of transformation *of* the participant" (Harvey & Knight, 1996, p. 7; emphasis in original). It is a philosophical view that negates the market-orientation idea of students as consumers. Moreover, it questions the applicability of notions of quality that focus on products and services in the context of education, such as the first four heretofore discussed.

Table 5: Categories of quality

Based on Harvey and Green (1993); Harvey and Knight (1996); Schindler, Puls-Elvidge, Welzant and Crawford (2015)

| Exceptional | Fitness for purpose | Consistency / Perfection | Value for money | Transformation |
|---|---|---|---|---|
| • Takes as axiomatic that quality is something special. It has three variations:<br>• traditional notion of quality as distinctive, special, or high class<br>• quality as embodied in excellence (achieving the highest of standards; exceeding very high standards)<br>• conformance to minimum standards (diluted form of excellence) | • satisfying customer specification / customer satisfaction; meeting customer requirements<br>• defined by institutional mission and vision<br>• quality assurance models | • consistency in flawless outcomes or outcomes without errors<br>• establishing quality culture that results in producing consistent products | • cost effective; customer charters<br>• performance indicators | • qualitative change in participants; enhancing and empowering participants<br>• continuous improvement; value added viewed by stakeholders |

In their review of existing literature on quality in the field of education, Schindler et al. (2015) argue that a universal definition that covers various types of institutions and diverse geographic locations proves to be one of the major challenges in the discourse on quality. Definitions are also related to the diverse values held by stakeholders on how quality should be conceived of and measured. The role of culture not only in the definition, but also in the application of quality as terminology, cannot be discounted. This refers to the relevance of cultural, social, national, and political contexts in defining the concept of quality and in understanding its implications at the practical level. Also, the authors do not find a clear relationship between quality assurance and accreditation in the literature. Nevertheless, the ideas associated with quality have remained stable for the last 20 years. That is, quality as a concept can be understood along four main categories: purpose, exceptionality, transformation, and accountability. These categories underline the central goals and outcomes of quality from a broader perspective and are consistent with the earlier definitions developed in the 1990s (e.g. as discussed above). Another dimension of quality is related to specific indicators in terms of input/output to measure the extent to which quality has been achieved. These indicators are also grouped into four categories: administrative, student support, instructional, and student performance. The latter illustrates the newer trend in English-speaking countries to define quality from the perspective of the stakeholders which has shifted the focus from accrediting bodies and adherence to a set of pre-defined standards to outcomes of student learning. Such a shift is driven by HEIs' need to demonstrate quality, to bolster public trust, and to justify funding (Schindler et al., 2015, pp. 1-5). In creating their conceptual model of quality, the authors synthesize the various

concepts found in the literature and account for the perspectives of the various stakeholders in the process. Their model is summarized below: the first row indicates the four classifications of quality, while the second row provides examples of specific indicators for each classification. In their conceptualization, the authors emphasize the importance of recognizing the multidimensional and dynamic nature of quality, as well as the relevance of clear indicators in assessing and measuring quality.

Although the definitions provided above have remained stable through the years, the conceptual meaning of quality has shifted from its initial ideas (quality as customer satisfaction or total quality, perfection, or value for money) to contextual meanings from the ground. Such situated meanings could denote negative experiences such as burden, bureaucracy, and game playing in the form of ritualized compliance (Newton, 2010, p. 52; Williams, 2016, p. 99). In other words, the perspectives on the concept have shifted from its formal definitions linked to total quality models mainly borrowed from the production sector to the situated and contextualized understanding of quality viewed from the ground and based on real-life experiences of academics and other front-liners in the higher education sector, indicating a *politics of quality* (Newton, 2010, p. 52; my emphasis). Similarly, Skolnik (2010) argues that quality needs to be viewed not only as a technical process, but more importantly, as a social and political process. It is imbued with power that influences higher education structures (such as funding allocation based on quality measurements), and it impacts the relationship between those who create the policies, those who need to implement them, and those who are affected by them (Morley, 2003).

As Harvey and Lewis (2010) note, "the analysis of quality should not be detached from purpose and context and that quality has political dimensions and is about more than satisfaction" (p. 7). Much of the scholarship on quality management in education originates from Western Europe and the US. Thus, traditions of quality management that emerged from the Global North may prove to be elusive when transferred to the Global South or non-western countries. Although there is no consensus as to if and how quality management systems have enhanced quality of education in developed countries, they have been adopted with little variation by quality assurance agencies around the world as a basis for higher education development. Moreover, contextual issues are very often neglected in the development of quality assurance methods and mechanisms in non-Western countries (see Harvey & Green, 1993; Harvey & Williams, 2010).

Table 6:  Conceptualizing quality

Based on Schindler et al., 2015, pp. 5-6

| Classifications of Quality | |
|---|---|
| Purposeful | Institutional products and services conform to an institutional mission/vision or a set of specifications, requirements, or standards, including those defined by accrediting and/or regulatory bodies |
| Exceptional | Institutional products and services achieve distinction and exclusivity through the fulfillment of high standards |
| Transformative | Institutional products and services effect positive change in any or all domains of student learning and in personal and professional potential of all participants of the educative process (i.e. students, researchers, academics) |
| Accountable | Institutions are accountable to stakeholders for the optimal use of resources and the delivery of accurate educational products and services with zero defects |
| Categories of Quality Indicators | |
| Administrative indicators | Pertain to the administrative functions of an institution, including developing a relevant mission and vision, establishing institutional legitimacy, achieving internal/external standards and goals, and procuring resources for optimal institutional functioning |
| Student support | Relates to the availability and responsiveness of student support services |
| Instructional indicators | Refers to relevancy of educational content (i.e. competencies match with labor market requirements) and the competence of instructions |
| Student performance | Indicates level of student engagement with curriculum, faculty, and staff, and increases in knowledge, skills, and abilities that lead to gainful employment (related to instructional indicators) |

### 5.4.1.2.    Quality standards

Harvey and Knight (1996) note that the term standard is a strange one, particularly in connection to the concept of quality. Lexicons define standard as a synonym of quality, albeit in usual or expected terms, or as an accepted pattern or model, but not necessarily involving something special, especially when thought of as being correct or acceptable. These definitions are closer to the explanations provided by Harvey and Green (1993). However, standard is a complicated term as it also denotes a fixed threshold that serves as a starting point from which something can be measured, or a level that can be achieved. Harvey (2006) argues that quality refers to how things are done whereas standards are used to measure outcomes; thus, quality is process-oriented, while standards are specified and fixed measures that indicate outcomes or achievement (p. 3). In other words, despite the widespread use of standards as a synonym of quality, they are not the same. Consequently, the notion of quality standards is thus equivalent to the notion of standards as a set of criteria to achieve a certain level.

Notwithstanding its elusiveness, standards in education are related to four broad areas of activities: academic standards, standards of competence, service standards, and organizational standards (Harvey & Knight, 1996, pp. 26-27; Harvey 2006, p. 4). While service standards refer to assessment of specific elements of the services and facilities that higher education institutions provide to students, organizational standards relate to the principles and procedures by which institutions are formally recognized for having the appropriate environment for learning and teaching (Harvey & Knight, 1996, pp. 16-17; Harvey, 2006, p. 4). On the other hand, the distinction between standards of competence and academic standards is not always clear. Harvey defines standards of competence as the technical abilities or achieved range of competencies that students require, for example, to practice a profession or be proficient in workplace contexts. These competencies include cognitive (e.g. use of theory), functional (e.g. technical), and interpersonal (e.g. social) elements. Academic standards, on the other hand, indicate a measure of demonstrated intellectual ability of students to meet a specific level of attainment in relation to stated objectives or outcomes (e.g. learning outcomes) operationalized through performance assessment (Harvey, 2006, p. 4; Bloxham, 2012, p. 186; Sharp, 2017, p. 139). However, Thompson-Whiteside (2011) notes that academic standards are context and discipline-bound; and as such, they vary from discipline to discipline and from institution to institution. There are also several factors that dynamically contribute to defining academic standards. Thompson-Whiteside argues that the question of 'who sets the standards?' is critical as it points to a debate about power, control, and autonomy in higher education (2011, n.p.).

### 5.4.1.3. Quality assurance

In his synthesis of the definitions provided by various entities, Harvey (2004) defines quality assurance as "the collections of policies, procedures, systems and practices internal or external to the organisation designed to achieve, maintain and enhance quality" (para. 1). Still, Vlăsceanuet al. (2007) define quality assurance as an umbrella term that refers to the continuous process of evaluating the quality of a higher education system, institution, or program (74). It involves assessment and monitoring to ensure that processes are maintained or improved. As a regulatory mechanism, it focuses on accountability and improvement based on agreed-upon criteria (pp. 74-75). Internal quality assurance refers to intra-institutional systems and practices, while external quality assurance is carried-out by organizations or bodies external to the institution. Williams (2016) notes the ambiguous relationship between quality assurance and quality improvement, arguing that research shows a dichotomy of perspectives and a range of variations in-between. On one end, the two processes are viewed as potentially isolated from each other, due to the different perception of major stakeholders, such as government agencies and academic staff, on what quality assurance aims to achieve

and how the processes should be implemented. On the other end, there is a symbiotic relationship between quality assurance and improvement, emphasizing that quality assurance and quality improvement are both integral elements of the same process. Williams (2016), however, also emphasizes the relational aspect in quality assurance debates:

> The question of how the two concepts are related has important implications for how staff are treated, respect and trust, how institutional data can be used to improve what the institutions and ultimately, what universities are actually for (p. 101).

The relational context thus also includes emotional and psychological aspects of quality assurance, including its impacts on the working or employment conditions in higher education. The insertion of the quality discourse into higher education is an indicator of the changing relationship between the state and higher education institutions. It also marks a shift in the distribution of responsibility and authority (both political and intellectual), not only between the state and higher education institutions, but between all relevant stakeholders of the education system, including students, their families, and local communities (Morley, 2003). More importantly, the quality discourse amplifies questions of relationships of power through the ways norms or standards are produced and maintained (Morley, 2003).

### 5.4.2.  A brief historical context

In 1924, Leonard Wood, Governor General of the Philippines, wrote in his annual report for the US government the following observations on public instruction in the Philippines:

> The widespread and keen interest in education continues to be one of the most encouraging features of the Philippine situation. The people are deeply interested in the schools and contribute very liberally to their support [….] The general progress in education, however, especially during the past few years, has been in quantity rather than quality [….] The system has expanded too rapidly for the best results (Wood, 1924, pp. 3-4).

These observations reflected the general attitude of the people towards education, a characteristic that has not changed in more than nine decades. On the other hand, they also raised the question of quality in relation to the rapid expansion of the school system. In the first systematic survey of the state of education in the country commissioned by the Bureau of Educational Survey following that year, the chairperson of the survey, Prof. Paul Monroe (1925), also expressed similar concerns, citing the priority placed on establishing schools, instead of improving the state of the education system in general. Similarly, Wood (1924)

identified four areas of concern or handicaps: high demand for education, inadequate infrastructure, lack of training of teaching staff, and insufficient funding. Regarding the state of the higher education institutions in the country, the Governor General noted the need to raise the standards of the University of the Philippines (instead of expanding the system), the efforts of the University of Sto. Tomas to improve its standards and replace Spanish with English, and the undetermined level of standards of the relatively new institutions, National University and the University of Manila. He also commended three private higher education institutions, namely, Ateneo, Silliman Institute, La Salle College, for their excellence and high standards (Wood, 1924, p. 6). In these statements, the term standard acts as a proxy for quality, since it occurs together with other terms that indicate quality, such as raising standards, improving standards, and high standards.

The destruction and aftermath of WWII provided the impetus to rebuild the country economically and socially. It was therefore an imperative to build-up an educated workforce to support nation-building efforts. On the other hand, the demand for access to higher education was so immense (and still is), that the government was (and still is) unable to cope with the demand. These two basic conditions accounted for the increase in the number of higher education institutions, the majority of which were privately-funded (i.e. founded by private individuals, families, corporations, or religious orders). However, the rapid expansion of the higher education sector resulted in complexities, such as difficulties in monitoring the quality of programs and chronic underfunding of public institutions. Nevertheless, the growth the country's education system was one of the most important developments on the islands in the fifteen years after the country gained independence from the U.S. colonial government in 1946. In 1961, Dr. Arthur L. Carson, a Presbyterian missionary and president of Silliman University from 1939 to 1953, wrote a Bulletin on the status of higher education in the country based on various education surveys conducted on the islands up to 1960. Carson (1961) summarized these problems in his Bulletin for the Office of Education, US Department of Health, Education, and Welfare as follows: "The field of education was claimed by the state but was left open to private initiative" (p. 111). Specifically, he noted the inadequate precollege preparation of students, the complex language problem (see Section 5.6.2.2), mismatch between available programs of study and societal needs, the difficulties of supervising private institutions, and lack of adequate resources and infrastructure (p. 194). He further commented that the 'emergency' of providing access to higher education was now in the past and efforts must be shifted to formulating and meeting new standards of quality that go hand in hand with social usefulness. For this to be achieved, he argued for an effective collaboration between government agencies and "better colleges and universities, both public and private" which would set the benchmark for other institutions to follow. In concurrence with other scholars who

conducted education surveys in the country, he voiced concerns over the uncontrolled increase of private organizations, specifically profit-orientated higher education institutions and the quality of education they offer (Carson, 1961, p. 2). Similarly, Danskin (1979), who conducted comparative research on quality and quantity of higher education between Thailand and the Philippines in the lates 1970s, argued that the constant pressure to expand access exacerbates the growth of profit-orientated institutions, wherein "quality education is often lost in the battle for financial success" (1979, p. 317; p. 322). She also noted that a quality management system, such as accreditation, could be a feasible solution to control the problem, albeit this would very much depend on political will (p. 322). Corpus (2003) refers to several studies commissioned by the Philippine government which indicate that, indeed, quantity has a deteriorating effect on the quality of higher education in the country. This once again underlines the aggravating impact of a lack of government financial support to private institutions which leads to heavy reliance on student fees and endowments (de Jesus, 2011; Asian Development Bank [ADB], 2011; Smolicz, 2001).

In essence, quality concerns have been the basis for the major reforms in the last 60 years, including the most recent Enhanced Basic Education Act of 2013 (Valisno-Dumlao, 2012). Major studies, such as the Congressional Commission on Education (EDCOM, 1991), The Philippine Education Sector Study (PESS, 1998), and the Presidential Commission on Educational Reform (PCER, 1998), have raised concerns over the deteriorating quality of the education system and have thus resulted in a long list of recommendations for reforms (de Guzman, 2003). Subsequent reviews on the status of the implementation of the policy recommendations indicated that, although some measures have been taken, the perennial quality problem still exists and manifests itself in various ways. In higher education, these concerns pertain not only to the continuing increase in the number of low performing public and private institutions, but also to the lack of government funding for the sector. Thus, the "problem of quality is not isolated to basic education. At the tertiary level, there is ample evidence also of substandard quality" (WB, 2004, p. 8). Another review conducted for the United States Agency for International Development noted that the "Philippine higher education system has deteriorated over the years" due to the following problems: lack of innovative research, shortage of qualified academics and teaching staff, poor performance in professional licensure examinations which is a key indicator of performance, rise of local universities and colleges, and university graduates who lack foundational skills, such as problem-solving, critical thinking, initiative, and creativity (Buendia et al., 2011, paras. 26-30). The constant public pressure to provide access to higher education has not waned in the last decades. Welch (2011) attributes this to population explosion which was, on average, 2.7% from 1960 to 2003, and 1.66% from 2004 to 2018 (WB, 2019). Despite the downward trend since 2013,

a larger population significantly increases the number of potential students. A high population coupled with increasing levels of aspirations for social mobility amongst the youth, high rates of local unemployment, effects of unfavorable economic policies, overwhelming foreign debt, deep-seated corruption, and pressures from funding agencies such as the WB, have heightened the quality issues in the Philippine education system (Welch, 2011).

> […] the Philippine higher education system mostly embodies quantity rather than quality [….] quality of institutions shows a strong correlation between a 'good' institution […] and those attended by the wealthier middle classes. 'Poor' institutions, are for the most part, ones for the poor [….] Indeed, recent studies point to the lack of quality as a key weakness of the Philippine higher education system [….] (Welch, 2011, p. 120).

This clearly implies further dimensions of the quality issue. Despite an enrollment rate of 35.8% in higher education in 2017 (WB, 2018), the problem of equal access to quality institutions persists. Here, quality is related to the availability of infrastructure such as equipment, library facilities, educational level of the teaching staff, and the quality of program offerings (Welch, 2011, p. 120). It implies that good public institutions remain inaccessible to students from poor families due to competitive admission requirements, which in turn also points issues of access to quality basic education. Another dimension that underlines quality concerns is the unemployment rate of graduates. According to the Philippine Statistics Authority (2018), 21% of the 5.3% unemployed population aged 15 years old and above were college graduates. This is alarmingly high, particularly because it is only 8% less than the unemployment rate of those who have completed only some secondary schooling. This situation signals another related dimension of the quality debate: the mismatches between the demands of the labor market and the programs that students complete, between the skills and competencies that students acquire and the expectations and requirements of the labor market, and between the needs of rural areas and the curricula or program offerings (Welch, 2011, pp. 122-123; see also Orbeta, Jr., 2002). Welch (2011) argues that this leads to the social issue of brain-drain or the exodus of professionals and workers from the country (p. 117). Idrus (2003) termed this situation as a self-serving debilitating cycle common to developing countries and one that is extremely difficult to break.

The brief discussion provided here sketches out how quality has become constituted as part of the discursive practices in education in the Philippines. In other words, the problem of quality of education in the country is a chronic one; it is one of the most persistent issues that the Philippine education system faces and is the key concern for policy makers. The discourse on quality also indicates entanglement with other discourse strands in education, such as: quality

of basic education, language policies (particularly on the use of native languages, Filipino, or English as media of instruction in basic education), access to and equity in higher education, higher education governance (especially in relation to funding, privatization, and government control), relevance of programs to students and to society, adequacy and distribution of financial resources, and labor market conditions. It also suggests a deficit view of the higher education system that positions the Philippines as lagging or poor, particularly in relation to international standards. More recently, and more importantly for this research, the discourse on quality has become deeply embedded and intricately entangled with the discourse on internationalization.

### 5.4.3. Quality in Philippine higher education

According to Dumlao-Valisno, the general definition of quality education is based on "fitness for purpose vis-à-vis national development requirements and those of globalization" (2012, p. 5). As previously discussed, this classic definition illustrates a functional approach that is heavily couched in economic discourse, particularly in terms of products, services, and customer satisfaction (Harvey & Green, 1993). It also emphasizes that the onus to maintain and increase quality is on the higher education institutions which are, in economic terms, the service providers. However, the service is not only directed towards the students or the consumers in the classic sense of the word; from this definition, higher education institutions are, first and foremost, accountable to the national government in meeting the *requirements of globalization* and of national development (my emphasis). Full details of the policy on quality assurance in higher education in the Philippines can be found in CMO 46, Series of 2012. This policy aims to align the higher education system to learning competency-based standards and to a typology-based quality assurance system of institutions.[20] The CHEd's definitions used in CMO 46 mirror the definitions discussed earlier in this section. In particular, the CHEd subscribes to a definition of quality that is determined by achievement of or conformance to standards. As Harvey and Green (1993) discussed, the concept of quality as conformance to standards is a weaker or diluted form of excellence. Although it does allow for systematic comparison amongst programs and institutions, it tends to overlook the need for difference and diversity (Morley, 2003). To overcome this dilemma, the CHEd further explains that it views quality assurance as a way to ensure "that there are mechanisms, procedures and processes in place to ensure that the desired quality, *however defined and measured*, is delivered (CMO 46, 2012, p. 3; my emphasis). The CHEd borrowed this phrase, thus its definitions indicate intertextuality with Harvey and Green who examined quality in philosophical and political contexts of quality assurance in the United Kingdom (1993). However, the authors' critique on

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[20] OBE or Outcomes-Based Education is very often used interchangeably with CBE or Competence-Based Education (Lassnigg, 2015).

the implications of such a definition got lost in translation or in the process of recontextualization into the Philippine higher education context. Harvey and Green argue that such a conceptualization of quality assurance underlies the assumption that the existence of mechanisms would assure the existence of quality, but a "stamp" of approval that quality assurance mechanisms exist is not per se a proof of quality, rather an indicator that processes are in place to monitor quality (1993, p. 19). On the contrary, the CHEd refers to the borrowed phrase to justify its approach to quality and quality assurance, particularly the typology-based scheme (see Section 9 of CMO 46). The notion of quality as transformation, on the other hand, refers to continuous improvement of higher education institutions' quality management systems and processes. It refers to an internal quality assurance system that uses the Deming Cycle from Total Quality Management (TQM). As already discussed, TQM is a management system that originated in the car manufacturing industry and has been recontextualized and transferred to the education sector: a process that many academics consider as precarious because it discounts not only the specific conditions of education, but also the distinctiveness of the learning and teaching processes and the goals of education.

Notwithstanding, it is necessary to briefly discuss how the quality assurance system is envisioned in the Philippine higher education to gain a better understanding of how it has been designed for implementation and, more importantly, how it is linked to the country's internationalization strategy. The CHEd's approach to quality is based on the typology of HEIs, a baseline for comparison (standards and criteria), and a devolution of responsibilities pertaining to quality matters within the structures of HEIs (CMO 46, 2012, p. 6). The CHEd's quality assurance system differentiates between horizontal and vertical typologies. Horizontal typology categorizes higher education institutions into either professional, college, or university. This categorization is based on the institution's defined mission, profile, functions, and program outcomes vis-à-vis their service to the society. Vertical typology refers to the institution's accreditation status. An institution can either be autonomous by evaluation, deregulated, or regulated. Accreditation status has two criteria for assessment. One is program excellence manifested through program accreditation (levels 1 to 4). The other is institutional quality (such as internal QA systems, international accreditation, and similar mechanisms). In the CHEd's quality assurance system, institutional quality is directly related to program excellence. In other words, the number of programs accredited at the highest level is a major criterion for determining institutional quality.

Program accreditation is applied for by HEIs on a voluntary basis through self-evaluation and peer-evaluation. Accreditation can only be granted by non-government agencies authorized by the CHEd. It assesses conformance to the CHEd's policies and standards for each specific

program for which the accreditation is applied for, and HEI's facilities and resources *over and above* the minimum requirements set by the CHEd (my emphasis).[21] There are four levels of program accreditation, with level one being the highest. Each level has a corresponding set of incentives. For state universities and colleges (SUCs), accreditation is also one of the criteria used to determine SUCs' levels for budget allocation purposes (a process called 'leveling') and in determining the salary grade of administrators (presidents and vice-presidents). Also, accreditation is currently limited to specific programs or study fields where standards exist. The CHEd uses the program accreditation as a major criterion in identifying and granting autonomous and deregulated status to private HEIs. Public HEIs, on the other hand, are autonomous by legislation (The Quality Assurance Agency for Higher Education, 2018). Private HEIs receive benefits for achieving autonomous and deregulated status. For example, autonomous institutions have administrative and financial autonomy, freedom to revise curriculum or establish new programs, priority for grants and subsidies, and other benefits (Macha, Mackie & Magaziner, 2018). In relation to internationalization, one benefit accorded to autonomous HEIs is the "privilege to establish linkages with recognized foreign higher education institutions" as long as HEIs fully comply with the CHEd's policy standards and guidelines for establishing twinning programs, networking, and linkages (CMO 19, 2016, p. 3). The table below summarizes these categories.

Table 7: Typology of Philippine higher education institutions

| Typology | Categories | Criteria for assessment |
|---|---|---|
| Horizontal typology | • Professional institutes <br> • Colleges <br> • Universities | Quality is assessed based on HEIs' functional differentiation vis-à-vis their service to the nation |
| Vertical typology | • Autonomous by evaluation <br> • Deregulated <br> • Regulated | Quality is assessed and evaluated on two levels: institutional accreditation and program accreditation |

It is not the aim, and is thus beyond the scope, of this research to provide a thorough analysis of the CHEd's policy on quality assurance. Suffice it to say that it is an intricate web or network of overlapping policies, functions, and stakeholders. However, to understand the implications of quality on internationalization, it is necessary to discuss, albeit briefly, the significance of the CHEd's approach. Harvey and Green (1993) provide a detailed discussion of the conceptual issues of each definition that the CHEd adopted. First, as mentioned previously, quality as fitness of purpose is a functional definition that circumvents two basic questions: who defines

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[21] The Federation of Accrediting Agencies (FAAP) is the umbrella organization of accrediting agencies for private HEIs, while the National Network of Quality Accrediting Agencies (NNQAA) is the umbrella organization of accrediting agencies for public HEIs. There are three organizations under FAAP and two under NNQAA. These agencies also refer to ASEAN Quality Assurance Network and ASEAN Quality Reference Framework in formulating their standards.

purpose and how will it be assessed? In the CHEd's policy, the onus of defining quality is shifted onto the higher education institutions through internal and external quality assurance systems. The typology-based, or tier, system patterned after the US system views HEIs as operators in niche markets. Thus, according to Harvey and Green (1993, p. 19), "quality as 'fitness for purpose' becomes fitness for, and performance in, the market as perceived by the institution."

Whenever applicable, the CHEd orients its policies in international standards. For example, in disciplines or professions that have established international frameworks such as engineering, nursing, or maritime education, the curricula are aligned with such frameworks. In cases where there is a lack thereof, the Technical Panels and Technical Committees need to ensure that programs are "comparable to similar programs in the Asia-Pacific region and other regions of the world in terms of quality standards" (CMO 46, 2012, p. 13). But quality as conformance to relative standards is inherently problematic, because it is a residual notion of quality and undervalues the notion of quality as exceptional (Harvey & Green, 1993, pp. 14-15). As Harvey (2018) notes, the idea of quality education has been 'hijacked' by the notion of quality assurance, so much so that the meaning of intrinsic quality has come to mean the processes of how quality can be assured, rather than the essential quality of higher education provision (p. 15).

### 5.4.4. Discourse topoi

In this section, I describe the patterns of arguments or the topoi that underpin the discourse on quality in relation to the CHEd's internationalization strategy. In the Philippines, the discourse on internationalization is strongly related to the discourse on quality. In fact, the CHEd formulates internationalization as a key strategy in improving the quality of the higher education sector (Milla, 2019). In the documents examined for this study, the CHEd does not provide clear definitions of quality, although it refers to quality 35 times and quality assurance 17 times in CMO 55. In the press releases, quality was also implied through the use of other terminologies such as rankings, human resource development, or innovation. The Commission did mention that quality improvement is one of the policy paper's thrusts of, however it was not explicit on why or what quality means. Notwithstanding that the discourse on quality is constitutive of the CHEd's internationalization strategies, one has to trace the path of the policy discourse to understand the implications of the discourse to the CHEd's approach. This is a critical step that points to fundamental concerns when conducting critical policy analysis using policy documents as unit of analysis. Specifically, tracing further documents for cross-referencing affords insights on the subtle nuances in understanding the link between internationalization and quality.

### 5.4.4.1.    Topos of Burden

The Topos of Burden or weighing down is a specific form of Topos of Consequence that states: if a person, an institution, or a country is burdened by specific problems, one should act in order to diminish these burdens (Reisigl & Wodak, 2001, p. 78). Within this context, the topos could be formalized as:

A:    The Philippine higher education is burdened by problem X.

A2:    Solution Y will mitigate the burden (known as problem X).

CR:    If solution Y is implemented, then the burden (problem X) will diminish.

C:    Thus, solution Y must be implemented.

A basic burden that the country needs to mitigate is the too slow pace of economic development. This is evident in the following passage taken from the CHEd's policy standard to enhance quality assurance in Philippine higher education:

> Section 4. The importance of quality and quality assurance is highlighted by the urgent need to move significant populations [*sic*] of Filipinos out of poverty and to address local, regional and national development concerns by educating quality leaders, thinkers, planners, researchers, technological innovators, entrepreneurs, and the much-needed work force [*sic*] to launch the national economy (CMO 46, 2012, p. 2).

This passage amplifies two conditions. First, Philippine higher education institutions are mandated to contribute to national development; they are perceived as one of the critical instruments to mitigate and support the country's development. Second, and in relation to the first, quality assurance must be established to support Philippine higher education institutions to develop their capacity to deliver quality education. The assumption is that quality education will bring about national development. In the same policy document, the burden of quality is also expressed as a threat and further underscores the focus on quality and quality assurance:

> […] the reality of an ASEAN community by 2015 which will facilitate the free flow of qualified labor in the region and either open up opportunities for graduates of Philippine HEIs or *threaten their employment even in their own country* (CMO 46, 2012, p. 2; my emphasis).

The above phrase thus links quality and quality assurance to secured employability of Filipino graduates. In other words, the burden of quality must be addressed to diminish the threat of

unemployment in the home country. This leads to the next burden, that is the burden of deteriorating quality. This could be translated as:

A:     The Philippine higher education is burdened by deteriorating quality.

A2:    Quality assurance will mitigate the burden.

CR:    If quality assurance is implemented, then the burden will diminish.

C:    Thus, quality assurance must be implemented.

This line of reasoning is critical to understanding the approach and direction of the CHEd's internationalization strategy. For instance, in a presentation on the state of higher education in the country, former Chairperson of the CHEd, Patricia Licuanan (2017), expressed the following as persistent issues: limited access to quality higher education, particularly for the deserving poor and disadvantaged students; unchecked proliferation of programs as well as public and private HEIs; the deteriorating state of quality that has led to skills-jobs mismatches and a deficient culture of science and innovation; and corrupt practices. These issues indicate problems that are directly and indirectly related to quality within the higher education system (2017).

In its Strategic Plan 2011-2016, the CHEd argues that the Philippine higher education system is beset by a lack of overall vision, framework and plan, a deteriorating quality of higher education, and limited access to quality higher education (p. 2). Thus, the CHEd's reform agenda focus on five key areas: 1) rationalizing the Philippine higher education system; 2) improving quality and standards; 3) broadening access to quality higher education; 4) ensuring a transparent, morally ascendant, efficient, and effective management system; and 5) ensuring effective organizational development.[22] Four key areas are directly linked to institutionalizing a quality assurance system that covers all levels of activities, from program design to faculty development to governance. For example, under the first key area, HEI programs, activities, and projects need to be aligned to the national development goals vis-à-vis a typology and the mapping of HEIs and their programs needs to be harmonized with quality assurance criteria. The second key area relates to monitoring, evaluation, and accreditation of programs, as well as fostering capacity development of faculty and institutions. In other words, a substantial portion of the CHEd's reform commitments center around enhancing quality and implementing quality assurance measures. As the CHEd's Strategic Plans beyond 2016 are not publicly available, it is here assumed that the endeavor to improve the quality of higher education continues to the present.

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[22] The author acknowledges that these terminologies are inherently problematic and used vaguely in the documents. However, a detailed discussion on their implications are beyond the scope of this research.

The press releases examined for this study also indicate traces of the Topos of Burden and underscore the need to improve the quality of education in the country. In these documents, quality is both the raison d'être and the expected result of internationalization activities. For example:

> […] this partnership is part of CHED's K to 12 Transition Program to support higher education institutions (HEIs) and personnel faced with multi-year low enrollment as a result of the full implementation of Senior High School (SHS) this year, while leveraging this period to invest significantly in improving the quality of higher education (CHEd PR, 2016b, para. 2).

The CHEd's partnership with the British Council in the provision of faculty scholarships for PhD studies in the UK is based on the premise that this partnership is an investment in quality education. In other words, the Philippines has to make a significant investment to improve the state of higher education. In another press releases from 2015, the CHEd repined on how the country could improve its engagement in the "ranking game" to improve the international perception of quality of Philippine higher education:

> The Commission believes that the rankings of our top universities do not necessarily reflect their overall quality but engagement in the rankings game is a key concern for CHED because university rankings shape an uncritical national and international public's perception of the quality of our institutions and are real in their consequences (CHEd PR, 2015c, para 7).

In the above passage, the Commission refers to the QS World University Rankings which is touted as one of the most prestigious global rankings of higher education institutions. Using the Thomas Theorem (Thomas & Thomas, 1928) as a premise, the CHEd argues for the need for policy initiatives to improve the country's engagement with the "ranking game" so as to efface the reputation that Philippine higher education institutions are inferior to those of their counterparts in the region. It compelled CHEd to invest in the Journal Incentive Program (JIP) which provides financial incentives to higher education institutions and scholarly organizations that produce high-quality journals, and thus contribute to the sector's international reputation (CHEd PR, 2017i).[23] Further, in 2018, the CHEd's incumbent Chairperson De Vera renewed the CHEd's commitment to further boost the quality and competitiveness of the Philippine higher education system through a project that will assist "the Philippine universities to showcase their excellence to the world" (CHEd PR, 2018c, para. 6).

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[23] In January 2019, CHEd suspended the JIP until further notice.

### 5.4.4.2. Topos of Consequence

The term quality occurs in several parts of CMO 55. It was first mentioned in Article 1 which forms the background and the context of the policy. Specifically, it was mentioned under Section 4 which discusses the country's overall internationalization strategy. These strategies are enumerated as follows:

- Enhanced implementation of the quality assurance framework and the quality, effectiveness and efficiency of Philippine higher education institutions (HEIs);
- Systematic facilitation of country-wide and regional mobility and market access of students, faculty, and staff; and
- Strengthening of appropriate international linkages of HEIs for a sustainable Philippine international higher education sector (CMO 55, 2016, pp. 1-2).

Former Chairperson Patricia Licuanan stated that quality assurance (QA) is the cornerstone, the linchpin, that holds the country's internationalization strategies together (2017). Licuanan described the relationship this way: quality assurance is a requirement for internationalization, while internationalization is a mechanism for quality assurance (2017). One commonplace definition of the noun mechanism is a planned way of doing things, or way of doing things as part of a system. Thus, one approach to understanding Licuanan's statement is this: internationalization is a way, a means or a modus operandi to implement the quality assurance system and to improve the quality of the higher education sector; much as quality assurance is the necessary instrument to implement internationalization strategies. These views are also suggested in Section 4.a presented above. As follows, there is an assumed positive link between internationalization and quality in higher education.

In CMO 55, Article IV, Section 6, the CHEd articulates the assumed positive link between internationalization and quality. Here, it becomes explicit that the goal of the internationalization policy is to improve the quality of education:

> The internationalization policy for Philippine higher education has the primary goal of improving the quality of education that would translate into the development of a competitive human resource capital that can adapt to shifting demands in the regional and global environment to support and sustain the country's economic growth (p. 6).

The CHEd trusts that internationalization will result in quality improvements. For example, it expects that graduates will become employable in domestic and international labor markets, and that they will develop global perspectives and adaptable mindsets (p. 6). In the long-term,

the CHEd foresees that internationalization will "continuously upgrade and sustain the quality of Philippine HEIs" and achieve international standards (p. 6). For these improvements to transpire, "academic knowledge transfer" needs to occur (p. 6).

In a press release from 2018, the CHEd's incumbent Chairperson, Dr. De Vera, reprised the goal of internationalization by saying that it is to improve the quality of higher education which would then translate to competitiveness and thus economic growth (CHEd PR, 2018, para. 3). Similarly, in another press release informing the public on internationalization mentoring activities of the CHEd's International Affairs Staff (IAS), the Commission emphasizes the expected quality improvements through internationalization:

> Through internationalization, HEIs are engaged to discover their strengths and improve their institutional capacities to achieve quality improvements, diversity in academic content and experience and the attainment of international standards and recognition (CHEd PR, 2019b, para. 6).

Additionally, in the same document, CHEd underlines how:

> […] International Quality Assurance and how this IZN component creates an impact in advancing the reputation and branding of the university (CHEd PR, 2019b, para. 5).

In another statement released in 2014, the CHEd underlines the role of quality assurance in internationalization:

> CHED stands firm in its belief that the best way to internationalize or engage with the global academic community is for HEIs to intensify their quality assurance, capacity-building, and institutional development programs (CHEd PR, 2014a, para. 6).

These statements not only indicate an affirmative correlation between quality education, development of human resources, and economic growth, but they also stress the expectations or expected results of improving the quality of education, such as attaining standing in relation to international standards and enhancing reputation and branding. Walton (2013, p. 188) describes the reasoning that underpins the conclusions presented above as causal argumentation, and arguments from correlation to causation. These could be formalized as follows:

Argument from correlation

There is a positive correlation between A (quality and quality assurance) and B (internationalization).

Therefore, A (quality and quality assurance) causes B (internationalization).

or:

If there is a positive correlation between A (quality and quality assurance) and B (internationalization), then A is something worthwhile.

If A (quality and quality assurance) is worthwhile, then it should be implemented

The positive causal link between quality assurance and internationalization suggested by Licuanan (2017) permits variables A and B to be interchangeable (i.e. internationalization causes quality and quality assurance, and vice-versa). According to Walton (2013, pp. 188-189), the notion of positive correlation can be easily defined and measured, as it only requires that the assumed correlations be observed. This type of argumentation is generally weak, although not necessarily false. For instance, Altbach and Knight (2007) suggest that developing countries seek to internationalize their programs "to improve the quality and cultural composition of the student body, gain prestige, and earn income" (p. 294). The global survey conducted by the International Association of Universities in 2019 shows that, globally (except for North America), respondents perceived improvements in quality of teaching and learning as one of the top benefits of internationalization (Marinoni, 2019, p. 25). Similarly, in the European context, there is a wide understanding that internationalization is a significant strategy to enhance quality in higher education (see for ex. Vabø & Wiers-Jenssen, 2014). Mobility of staff and teachers, in particular, is considered beneficial for improving quality of higher education and research as it supports knowledge circulation and student mobility (European Commission/EACEA/Eurydice, 2018, p. 274).

Another argumentation scheme that can be applied in this case is the argument of cause or consequence.

A:     Enhancing quality assurance and the quality of the higher education sector will facilitate internationalization of the sector.

A2:    Internationalization is an integral part of the reforms in higher education.

CR:    If quality is brought about, then good consequences (i.e. internationalization and higher education reforms, quality improvements, enhancing reputation, etc.) will occur.

C:     Thus, quality assurance and quality must be brought about.

Having said this, the direct causal relationship between quality and internationalization is more difficult to construe, specifically because other variables or factors compound the process. In this case, Walton (2013, p. 189) suggests modifying the argumentation scheme.

Argumentation from cause (modified):
A is one of a set of conditions that, together with other variables or factors, are sufficient for B to occur (Walton, 2013, p. 189).

Taking in consideration with the other two strategies for internationalization mentioned by the CHEd in Article 1, Sec. 4, the modified argumentation scheme can be translated as follows:

> Enhancing the quality assurance and quality of higher education (taken together with the following concomitant strategies of effectiveness and efficiency in higher education, mobility and market access of students and staff, and strong and appropriate international linkages) are sufficient for internationalization to occur.

Interpreted in reverse, internationalization will not materialize if the quality assurance and quality of the higher education sector (and other concomitant conditions mentioned above) are not present. From this perspective, quality and quality assurance are tools to actuate the process of internationalization. This is an interesting angle to examine, particularly with respect to the role of the CHEd as a government unit that oversees the higher education sector.

### 5.4.4.3.    Topos of Regulation

The Topos of Regulation is a derivative of the two topoi discussed above: the Topos of Consequence (modified argumentation of cause) and the Topos of Burden. The Topos of Regulation is expressed as follows: regulation is a necessary condition, and is sufficient, for quality enhancement and internationalization to occur (see Walton, 2013, p. 189).

A:     Quality assurance is necessary to enhance the quality of higher education.
A2:    Quality enhancements through quality assurance are necessary to internationalize higher education
A3:    Regulation is necessary to implement quality assurance.
CR:    If regulation is executed, then good consequences (i.e. quality enhancements in, and internationalization of, higher education) will occur.
C:     Thus, regulation must be executed.

The Topos of Regulation is easy to identify in the CHEd's bi-focal regulatory and developmental roles (Chao, 2012; Licuanan, 2017; Malolos & Tullao, Jr., 2018). In fact, the first paragraph of the CHEd's Memorandum Orders emphasize these roles, referring to applicable laws and acts as its source, particularly Republic Act No. 7722 (RA 7722 or Higher Education Act of 1994) which created the CHEd. The Topos of Regulation in this sense has neither positive nor negative connotations, but it does underscore the CHEd's legitimate functions. Moreover, the Topos of Regulation in the discourse on quality is related to another topos, that is, the Topos of Law.

### 5.4.4.4. Topos of Law

The Topos of Law is a legitimizing strategy in a discourse. It indicates an entity's authority over other entities by virtue of law or legislation. As dicussed in Section 5.2.1, most of the CMOs examined in this study introduce the policy issue by underlining the 1987 Philipine Constitution or the Higher Education Act of 1994 as a source of its legitimacy. The Topos of Law can be expressed as follows:

A:    Law or codified norm X legitimizes A.

CR:    If law or codified norm X legitimizes A, then A must be recognized as legitimate.

C:    Thus, A is legitimate.


Thus:

A:    The 1987 Philippine Constitution and Republic Act No. 7722 legitimize the CHEd's power over and functions within the higher education sector.

CR:    If the 1987 Philippine Constitution and Republic Act No. 7722 legitimizes the CHEd's powers and functions, then CHEd must be legitimate.

C:    Thus, CHEd is legitimate and has legitimate powers and functions over the higher education sector.


For instance, Section 8 of CMO 55 underlines the CHEd's capacity as an agency that can categorize who permitted to participate in the sector's internationalization activities. That is, the CHEd is the regulator, implementer, and overseer of internationalization participants and activities. It controls participation by defining the criteria for qualification and thus also defines membership in the internationalization strategy through the categorization of higher education institutions.

> The CHED shall perform both a developmental and regulatory role in promoting the internationalization strategy (CMO 55, 2016, p. 7).

The use of the modal verb 'shall' needs to be given attention in all of the CMOs studied for this research. In the English grammar, 'shall' is usually used in formal contexts to talk about intentions or decisions. In legal texts, it is a semantic marker that separates the genre from other professions, and signals precision as well as a prescriptive orientation to language (see Foley, 2001). In this light, it could be interpreted that the use of 'shall' in the CMOs expresses a precise instruction on how things are to be done, or in the case of CMOs 55 and 62, who is responsible for what action. To illustrate, below are segments of CMO 55, Article IV, Section 9 which pertains to the specific principles of CHEd's internationalization strategy. Note the difference in the grammar between Sections 9.1, 9.6, and the rest of the examples.

Article IV, Section 9.

1. The CHED recognizes Philippine HEIs' prerogative to determine the thrusts and components of their internationalization programs in accordance with their mission and goals, resources and institutional capacities, and following the typology of the outcomes-based quality assurance system set in CMO No. 46 s. 2013, and other applicable laws.

4. The CHED shall determine the basic condition for Philippine HEIs to effectively implement internationalization programs [….]

5. The CHED shall likewise consider the maturity of the HEIs as an institution and its quality assurance systems reflected in well-documented business processes and the quality outcomes that contribute to program excellence [….]

6. Accreditation by CHED recognized accrediting bodies may be considered but not mandatory in establishing readiness to undertake internationalization [….]

9. Furthermore, SUCs' internationalization programs shall be consistent with the rules and policies prescribed by the professional regulatory government agencies and laws covering the implementation of the program's curriculum and activities.

11. CHED shall encourage HEIs qualified to participate in internationally-recognized benchmarks and assessments, in view of their positive impacts on global exposure and competitiveness of Philippine HEIs (CMO 55, 2016, p. 9).

In other words, the use of 'shall' in the CMOs highlights the CHEd's functions and scope of control. Thus, the Topos of Law underlies the CHEd's principles, policies, and strategies for internationalization. This pattern can be observed in all the data.

### 5.4.4.5.    Topos of Responsibility

The Topos of Law underpins the Topos of Responsibility. In other words, the Topos of Law codifies the responsibility of an entity and emphasizes the entity's scope of responsibility. It indicates performativity in the sense that it enables and shapes social reality (Brøgger, 2018). That is, the Topos of Responsibility enables the functions of the CHEd to materialize. The policy text serves as a technology that mediates the transition of an idea to materiality.

A:     Law or codified norm X prescribes A its scope of functions over a certain sector.

CR:    If law or codified norm X prescribes A its scope of functions over a certain sector, then A must perform its functions within the prescribed scope.

C:     Thus, A must carry out its functions as prescribed.

Thus:

A:     The CHEd has a legal mandate by law to carry-out regulatory and developmental functions in higher education and research.

CR:    If the CHEd has a legal mandate, then it must carry out its functions.

C:     Thus, the CHEd must perform its regulatory and developmental functions.

In other words, the CHEd has responsibility over the higher education system and this responsibility rests on its legal mandate. For instance, in Article IV, Section 8.4 of CMO 55 (2016), the CHEd delineates the support and assistance it provides to higher education institutions. It does so by allocating its support based on a scheme that categorizes higher education institutions into four tiers. Tier one represents the highest level, while tier four represents the lowest. The scheme is shown in Table 8 below. The left column labeled as Levels refers not only to HEIs' expected scope of engagement in internationalization, but more importantly, it refers to HEIs' level of development in terms of maturity of its quality assurance system. Maturity in this sense is measured through the number and level of program accreditation. Thus, the scheme is closely tied to the CHEd's typology-based quality assurance system. It imposes compliance with the CHEd's QA standards and program standards, and rewards existing capabilities and active participation in internationalization activities with state-supported forms of further involvement in internationalization, both at the local and international levels. Moreover, "the panel of experts, per Article IX (1), shall determine the institutions belonging on each tier" (CMO 55, 2016, p. 8). This passage which precedes the table

illustrating the scheme is critical for understanding the policy guidelines in CMO 55 (2016). As in the previous section, the basic rationales for this policy approach are the topoi of regulation and responsibility. This emphasizes the regulatory function of the CHEd vis-à-vis the higher education institutions. The linkage with the Commission's QA system functions to enforce compliance by HEIs, although compliance alone does not guarantee that the HEIs will be ranked accordingly in the tier system. As indicated in Article IX, Section 1, the CHEd makes its decision through its technical panel for internationalization. Based on the CHEd's memorandum order on its typology-based QA system, the Topos of Regulation as well as the Topos of Responsibility are affixed to the CHEd's developmental function in ensuring that HEIs have quality assurance systems in place.

> *Where there are serious weaknesses or failures to comply with conditions attached to permits or recognitions, CHED will expect remedial action to be taken, and will use its powers in relation to such shortcomings as appropriate* (CMO 46, Series of 2012, Section 10, p. 4; my emphasis).

The above paragraph illustrates the punitive sanctions that the CHEd can impose on HEIs if QA compliance is not given or is perceived to be lacking. Thus, the CHEd has the power to control; to define the categories and determine membership in each tier in terms of who can or cannot participate in the internationalization process and how. Specifically, the CHEd's developmental function is highly correlated to its function to regulate. In the context of internationalization, the quality assurance system mediates these two functions, while the technical panel acts as the gatekeepers. Both the Topos of Regulation and the Topos of Law emphasize the CHEd's authority to exercise control through its mandate to regulate and develop the higher education sector. Based on the sample statements quoted above, these topoi have three dimensions. First, they refer to the CHEd's regulatory role in ensuring adherence to existing relevant laws such as the Philippine Constitution, the Corporation Code, and the Foreign Investment Act. Second, they refer to the CHEd's regulation of internationalization of HEIs in the country, including the regulation of individual HEIs' activities, design, goals, outcomes, and strategic approaches. Third, the CHEd has the power to define what interests can be considered legitimate and, based on this, who can actually participate in the internationalization process. Likewise, the CHEd defined the characteristics of a holistic and programmatic approach to internationalization, wherein the term programmatic can be understood as systematic or methodical. In these statements, two main ideas crystallize: tangible outcomes, measurable results, and protection regarding legitimate interests of participants and the higher education sector on one hand, and national interests on the other hand.

Table 8: CHEd's level of internationalization support

Taken from CMO 55 (2016, p. 8)

| Levels | Areas of CHEd Support |
|---|---|
| Tier 1 — the national university and select SUCs/autonomous HE's by evaluation; has national and international prominence and reputation as shown by international accreditation/awards/recognition/ membership in reputable international networks of universities; has good track record in successful implementation of international programs and linkages, including home-based internationalization activities with measurable outcomes affecting both community/ regional/ national levels; has a well-placed internationalization program/strategy; possesses all the necessary mechanisms, processes and facilities for a successful internationalization strategic plan i.e. IROs, international services office, sufficient and modern facilities; with well-defined typology | simultaneous student and faculty recruitment; strategic partnerships and research collaboration for innovation; participation in international scholarships, faculty and staff development; participation in international delegations by CHED and other NGAs; represent CHED/higher education sector in international meetings or organizations and support for their participation in these meetings/conferences participation in international fairs and education trade promotion; creation of joint, double, twinning degree programs; credit transfer and accumulation; niche-building initiatives; establishment of branch campuses and off-shore educational institutions; student internship and other study abroad programs; international educational trips; home-based internationalization activities as defined in Article III Section 2 (2) and other forms of international programs |
| Tier 2 — select SUCs/deregulated HEIs by evaluation with at least Level III program accreditation (or its equivalent as indicated in Article IV Section 9 (4); pursues home-based internationalization activities; possesses well-defined typology; undertakes membership in international networks; has an established international relations office, international student center, and quality assurance mechanisms; has an internationalization program/strategy | international student recruitment and systematic and strategic academic mobility programs; participation in international delegations by CHED and other NGAs; research collaboration and cultural exchanges that benefit a diverse group of students and academic officials' participation in international scholarships, faculty and staff development; student internship abroad programs; international educational trips; home-based internationalization activities as defined in Article III Section 2 (2) |
| Tier 3 —with at least Level II accreditation (or its equivalent as indicated Article IV Section 9 (4); possesses well-defined typology; has an established IRO and international student center; has an internationalization program/strategy | international student recruitment for immersion/cultural activities; network/linkage-building activities that benefit a limited number of students and HEI officials and do not lead to degrees; student internship and other study abroad programs; international educational trips; home-based internationalization activities as defined in Article III Section 2 (2) |
| Tier 4 — has an existing internationalization vision with a limited number of academic cooperation agreements | home-based internationalization activities as defined in Article III Section 2 (2) |

### 5.4.5. Summary

The discourse strand on quality and quality assurance is one of the most prominent and enduring discourses in the Philippine educational system. To deconstruct the role it plays in the internationalization process, it is necessary to demonstrate how the notion of quality is embedded in the policy guidelines. Figure 11 below illustrates the topoi used to solidify the role of quality and quality assurance systems in internationalizing the Philippine higher education sector.

Figure 11: Topoi embedded in the discourse strand on Quality
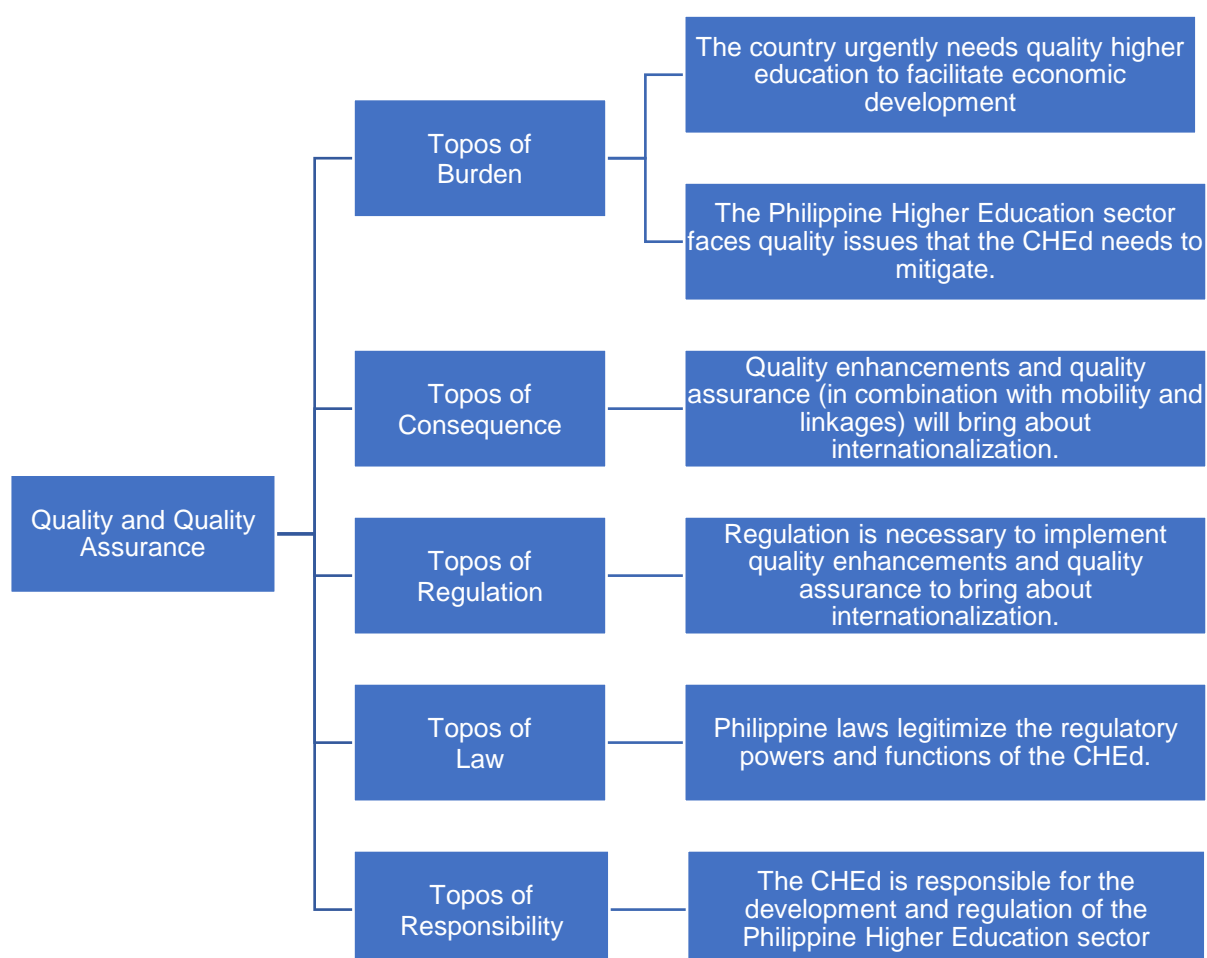
## 5.5. Discourse strand: ASEAN

The discourse strand on ASEAN is embedded in the current history of the Philippines. As one of ASEAN's founding countries, the spirit of ASEAN and its commitment to peaceful conflict resolution are significant to the country, particularly in regards to foreign relations within Southeast Asia. The importance of ASEAN as a regional organization is also evident in the documents examined for this study. As discussed in the beginning of this chapter, tracing the path of the discourse strands demanded untying several knots found in a variety of documents. For this section, the main challenge is to establish the location and relevance of ASEAN within the discourse network. The CHEd mentions ASEAN ten times in different locations in its CMO 55: in the background and context of the policy, the policy's guiding principles, and in Article V on academic mobility. It has issued three policies that specifically refer to academic mobility in ASEAN: CMO No. 33 (2013), CMO No. 11 (2014), CMO No. 19 (2015). ASEAN is also ubiquitous in the CHEd's press releases, with nine PRs out of 28, or 32%, either mentioning or focusing on ASEAN and related terms such as "Southeast Asia," "region," and "regional cooperation." In this discourse strand, the topos of "Reality" is the basis for the Topos of Commitment and Topos of Advantage or Usefulness.

### 5.5.1. A brief history of ASEAN

Southeast Asia (SEA) is a very dynamic region and its economic, political, and socio-cultural landscapes, including higher education, are changing dramatically. SEA has always been dynamic and fluid. According to Lockard (2007), it is not possible to talk about SEA's history without mentioning other countries or other regions of the world. Its history is marked by the mobility of people, ideas, religions, and trades, particularly from and with China, Tibet, Taiwan, India, and later on the Middle East (see Hung et al 2007; Joseph 2014). SEA's history "could be described as borrowing and adaptation, migration and mixing, the diffusion of religions, maritime trade, the expansion of Dar al-Islam, Western expansion and colonialism, and the rise of the global system" (Lockard, 2016, p. 190). These activities brought cultural, religious, and political influences which shaped the societies in the region. Many of these influences were adapted to indigenous beliefs and practices that resulted in variations and similarities within and among SEA countries (Joseph, 2014). At the height of Europe's global colonial expansion in the 17th century, existing kingdoms, empires, and tributary sultanates in SEA waned in their influence. The region became a battleground — militarily, economically, and later, religiously — for European powers. Thus, Europe appropriated SEA for itself. The Philippines, except the part of Muslim Mindanao in the South, was under Spanish influence and control. Indonesia was colonized by the Dutch. The British Empire was present in Malaysia, Singapore, Brunei, and Myanmar, while former Indochina (Viet Nam, Lao PDR and Cambodia) was a French colony. After about 360 years, Spain sold the Philippines (together with Puerto Rico) to the

USA. Although Thailand was not formally colonized, its current territory was defined by what the French and the British did not occupy (Stockwell, 1998). According to SarDesai (2012), the colonial regimes' influence on SEA countries' education systems has had a lasting impact on the region. The Western colonizers established educational systems based on their own models of schooling and to serve their own purposes. Although many aspects of these models evolved in time, the Western ideas and assumptions about education persist and impact contemporary patterns in higher education development in the region (c.f. Phillips & Schweisfurth, 2014; Altbach, 1989). The colonial period left the region in an unstable position with disputes over political territories aggravated by ethnic differences and crises of authority (Stockwell, 1998; Hack, 2012). During World War II, most parts of Asia were controlled by the Japanese Empire. After WWII, ASEAN countries gained independence, albeit only nominally in many ways (Hack, 2012). It was against this historical backdrop and the looming threat of communism emanating from Indo-China that the idea of a united Southeast Asia was born (Rasiah, Cheong, Cheok, & Loayza, 2019).

ASEAN was established in 1967 through the Bangkok Declaration signed by the Foreign Ministers of Indonesia, Thailand, Malaysia, the Philippines, and Singapore – the so-called 'Founding Fathers' (or nations) of ASEAN. This historical milestone was achieved against the volatile backdrop of political strife and attempts at reconciliation in the region, particularly between Thailand and Indonesia, and between the Philippines and Malaysia. The principal goal of ASEAN is to create a structure and basis for strengthening political and economic cooperation between its members as it strives for regional stability. Aware of their common heritage and history, ASEAN leaders have clearly stressed their commitment to the United Nations conventions on many occasions. But according to Rasiah, Cheong, Cheok, and Loayza (2019), the key document that defined a regional code of conduct *inter se* is the Treaty of Amity and Cooperation in Southeast Asia (TAC) signed in 1976 (p. 3; Seah, 2012). It spelled out the key tenets of the cooperation, which emphasizes recognition of the national identities and sovereignty of each of the member countries to ensure "non-interference in the internal affairs of one another," "security from external interference in any form or manifestation," "equality," "territorial integrity," and nonviolent dispute resolution (ASEAN, 2008; 2016a). The TAC is a legal instrument to "promote perpetual peace, everlasting amity and cooperation among their peoples which would contribute to their strength, solidarity and closer relationship" (ASEAN, 2016b, ch. 1, art. 1). It has been amended three times (1987, 1998, 2010) and as of February 2019, has been signed by 37 parties including all ASEAN Member States and Development Partners of ASEAN which include the EU, UK, USA, Japan, China, and India (Riccardi & Riccardi, 2020). In the years following its creation, ASEAN leaders have codified and signed several legal instruments to implement ASEAN's visions. When the ASEAN Charter

took effect in 2008, ASEAN became a legal entity recognized as an international organization. The Charter also created a legal and institutional framework for establishing an ASEAN Community by 2015. ASEAN achieved this milestone on 22 November 2015 by declaring the establishment of the ASEAN Community. The ASEAN Community is based on three pillars, or sub-communities, each with a blueprint that defines the ideal pathway to achieve the community's goals: Political-Security Community (APSC), Economic Community (AEC), and Socio-Cultural Community (ASCC). The first is concerned with maintaining political and security cooperation and responds to political dynamics within and beyond Southeast Asia. The second is aimed at integrating the economies of the ten member countries to facilitate economic growth and resilience against global volatilities. And the third, the ASEAN Socio-Cultural Community (ASCC), aims to develop a people-centered, socially responsible, and inclusive ASEAN Community and to forge a common identity among ASEAN citizens. Although the vision of achieving a "one ASEAN" is clearly articulated in all the three pillars, the ASCC ties all the measures together to help ASEAN uplift its societies from poverty and underdevelopment (ASEAN, 2015). In other words, these legal instruments overlap regarding their stated goals.

The region's economic growth in the last two decades has been impressive, so much so that major institutions such as the Asian Development Bank (ADB, 2018) and the OECD (2018) predict a bright outlook particularly for the so-called ASEAN-5,[24] if and when current positive conditions are sustained. The region is also expected to position itself politically as it straddles the current tectonic shifts in geopolitical relations that are taking place not only in the Asia-Pacific but in the rest of the world. This economic upswing gives a fresh momentum for ASEAN to achieve its goals, along with the need to effectively solve a myriad of issues confronting its member-countries. Because of these developments in the region and the changing economic and power dynamics in Asia in general, many scholars have predicted that the 21st century will be the Asian century (Hill & Fernandez-Chung, 2017; Khanna, 2019). Bhandari and Lefébure (2015) suggest that Asia has the potential to be next higher education superpower. Sceptics, however, are quick to point to political and territorial conflicts that threaten peace and security in the Asian region, the striking gaps in socio-developmental levels of Asian countries, weak governments, and political unrest (such as in Hong Kong and Taiwan). As Auslin (2019) argues, all these problems are deep and enduring, and they are "trending in the wrong direction" (para. 15).

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[24] The ASEAN-5 are Indonesia, Malaysia, Philippines, Thailand and Vietnam. Due to COVID19 pandemic in 2020, the OECD, WB, ADB, and ASEAN have adjusted their economic outlook for ASEAN to reflect the impact of the global health crisis to the region's economic performance.

On the other hand, one of the criticisms levelled on ASEAN point to patchy and incremental execution of policy instruments, particularly as regards economic integration, which result in implementation gaps across the member states (Das, 2017). Many scholars attribute the failures in performance to the basic principles of non-interference in domestic affairs, as well as the varying forms of political governance amongst the ten member countries. Specifically, Jones and Jenne (2016) note that ASEAN countries have weak states and disparate regimes, and the ASEAN-type regionalism limits the Association's capacity to fully realize the project. The conflict with China over the South China Sea has shown the organization's weakness and has challenged ASEAN's influence in international political arena and centrality in Asia-Pacific (Jones & Jenne, 2016). Currently, it is yet to be seen how member countries will recover from the economic setbacks caused by the health pandemic brought about by the COVID-19 virus in 2020. COVID-19 has affected key sectors around the globe, such as the service (particularly travel and tourism) and manufacturing sectors, and exposed vulnerabilities of many countries' health and social systems. In its policy brief from April 2020, ASEAN revised its growth projections downward, as its ten members struggle to fight COVID-19.

### 5.5.2.  ASEAN regionalism and higher education area

Regionalism in higher education is not new and the use of the term in higher education is closely related to the process of globalization and internationalization (see discussions in chapter 2.4.2). At an analytical level, regionalism and inter-regionalism are ideologies that shape strategies and give rise to formal intergovernmental collaboration, albeit the content of that ideology is shaped by diverse objectives and factors (Robertson, 2007, p. 3). In general, economic globalization and internal/domestic factors provided the impetus for nation-states to pursue regional blocs or cooperation. However, as Robertson (2007) argues, some forms of regionalism and inter-regionalism facilitate a particular form of participation in the global economy. Thus both is a response to and agent of globalization (p. 4). Broadly defined, regionalism is the outcome of economic integration processes (Robertson, 2008). In higher education, regionalism refers to extending the political project of regional governance to the higher education sector. It emphasizes initiatives such as intra-regional mobility and a system of qualification recognition framework to enable the region to compete with other regions (Chou & Ravinet, 2017, pp. 143-144). On the other hand, inter-regionalism refers to the processes and practices of collaboration between regional blocs, such as the SHARE project, which is the EU's flagship programme in higher education in ASEAN (Robertson, 2007, p. 3). In ASEAN, economic globalization – its benefits, shortcomings, as well as its perils – prompted member countries to adopt a layered approach or overlapping regionalism (Yeo, 2018; Rasiah et al., 2019, p. 7).

### 5.5.2.1. Overlapping regionalism

Rüland and Michael (2019) define overlapping regionalism as "institutional arrangements in which states have joined two or more regional fora that have identical or similar mandates in at least one policy field" (p. 180). Similarly, Yeo (2018) describes it as membership in a formal and informal "family of institutions," such as "bilateral alliances, mini-lateral meetings, and multilateral fora and summits" such as the ASEAN Regional Forum (ARF), ASEAN Plus 3 (China, Japan, and South Korea), the East Asia Summit, and the ASEAN Defense Ministers Meeting plus (Australia, China, India, New Zealand, South Korea, Russia, and the USA) (para. 2). In ASEAN parlance, its membership in and involvement with other institutions and organizations are part of its external relations. This type of regionalism could be beneficial to ASEAN in addressing governance issues and mitigating rivalries, particularly with economies that are more powerful than any of the ten member countries. Overlapping regionalism also provides ASEAN with diverse platforms and channels for dialogue and interaction. As Yeo (2018) argues, "states would find it more difficult to exert regional dominance if actors are intertwined within a complex patchwork of institutions" (para. 7). This strategy of "institutional hedging" is necessary for small powers like ASEAN member countries to ensure the centrality of ASEAN in their discourses, that their interests are represented and the regional architecture is sufficiently conducive to realizing its aims (Oba, 2019, pp. 127-128).

### 5.5.2.2. Harmonization of higher education

The approach of overlapping regionalism is also evident in the formation of ASEAN's higher education area. Harmonization of the ASEAN higher education space is one aspect of ASEAN integration that has been gaining traction recently but is often overlooked by commentators. Since 1997, ASEAN leaders have acknowledged and referred to the relevance of higher education in achieving the community's integration (McDermott, 2017). The Cha-Am Hua Hin Declaration from 2009 clearly articulates how education permeates not only the social but the economic and political pillars of the community. Specifically, it reaffirms the goal of the ASEAN Charter in enhancing the competitiveness of ASEAN societies through closer cooperation in education and life-long learning, and in generating innovation through science and technology. Cooperation in education is thus expected to empower the people of ASEAN countries and build a caring and sharing ASEAN community. It highlights human development as a key component in achieving the community's political, economic, and social aspirations. To this end, the Cha-Am Hua Hin Declaration stipulates different areas where inter-regional cooperation takes place (ASEAN, 2009). For instance, to support political integration, the Declaration suggests integrating ASEAN Charter values and cultures into school curriculum, implementing student mobility, and establishing a teachers' forum similar to the Southeast Asia School Principals' Forum. For the economic pillar, the ASEAN Qualifications Framework (AQF) is attributed a critical role in ensuring comparability of standards and professional qualifications

and thus promoting student and professional mobility within the region. In particular, the AQF is predicted to develop "ASEAN human resources that are regionally and globally competitive and meet the needs of industries in coordination with the ASEAN Labour Ministers Meeting (ALMM) process" (ASEAN, 2009, p. 2). Under the socio-cultural pillar, measures include creating and using common content on ASEAN as a reference point for teaching in schools and in teacher education, postgraduate university programs focusing on ASEAN arts and cultures, teaching of ASEAN languages, youth work including volunteering, and research and development focusing on regional needs (such as environmental issues).

The main architecture of the ASEAN Higher Education Space is defined in the Masterplan on ASEAN Connectivity 2025 (ASEAN, 2016c). Under the strategic objectives of establishing people-to-people connectivity, there are two main initiatives: policy on travel (such as simplifying visa regulations and processing) and education. Under education, there are two imperatives. First, to close the gap between vocational skills and demand for them by establishing training programs and a common qualifications framework across the member states. Second, to increase the mobility of intra-ASEAN international students by supporting higher education exchanges amongst ASEAN countries. Mobility of people is thus at the core of people-to-people connectivity. The ASEAN University Network (AUN) is envisioned to be one of the implementing bodies to this end.

In addition, the harmonization agenda is supported by the project SHARE which operated with a 10 million grant from the European Union from 2015 to 2019. Modelled after the European Higher Education Area (EHEA) and the Bologna Process, SHARE aimed to enhance regional co-operation and improve the quality, regional competitiveness, and internationalization of ASEAN higher education institutions and students (www.share-asean.eu). The project consortium was led by the British Council and comprised of the German Academic Exchange Service (DAAD), EP-Nuffic, Campus France, the European Association for Quality Assurance in Higher Education (ENQA), and the European University Association (EUA). During the four-year project period, about 500 scholarships (patterned after the Erasmus program) were provided to support student exchanges and credit recognition schemes to "put the improved systems to test" (www.share-asean.eu). Aside from the scholarships, SHARE and ASEAN convened ten intensive policy dialogues at political and operational levels to ensure that policy mechanisms and technical dimensions are aligned with the policy priorities of the established ASEAN Community. Further collaborative activities funded by SHARE focused on: ASEAN Qualifications Reference Framework (AQRF), ASEAN Quality Assurance (ASEAN QA), and ASEAN-EU Credit Transfer Systems (AECTS). According to McDermott (2017), these activities are the foundation of the ASEAN Higher Education Space architecture.

Another organization that is pivotal in forging the harmonization of higher education in ASEAN is the Southeast Asian Ministers of Education Organization (SEAMEO). The Ministers of Education of Southeast Asian countries established SEAMEO in 1965, two years ahead of the Bangkok Declaration that initiated ASEAN. This was in recognition of the crucial role of education in hastening the development of the region through cooperation in education, science, and culture. Aside from quality assurance and a credit transfer scheme, SEAMEO's agenda includes study visits to support capacity-building of higher education administrators for the internalization of their institutions and the development of the ASEAN International Mobility for Students (AIMS). SEAMEO initiated its first student mobility program in 2009, arguing that student mobility is the key strategy to developing the ASEAN Higher Education Area (SEAMEO-RIHED, n.d.). Its forthcoming programs include regional internships, training of International Relation Officers, teacher's training on ASEAN content, a higher education future forum, and a database on regional universities.

One further platform of cooperation is the Asia-Europe Meeting (ASEM). It was established in 1996 as an informal, intergovernmental forum for dialogue between ASEAN and other ASEM partners in the political, economic, social, cultural, and educational areas. As of 2018, ASEM consisted of 21 Asian and 30 European partner countries, as well as the European Union and the ASEAN Secretariat (ASEM, n.d.). In the area of education, the focus is on the ASEM Education Process, also called AEP, and on higher education.

ASEM has two transversal themes: digitalization (particularly in the context of the 4th industrial revolution) and the integration of the Sustainable Development Goals (SDG) in education systems, particularly in reference to SDG4, which is to "ensure inclusive and equitable quality education and promote lifelong learning opportunities for all" (United Nations, n.d.). ASEM's four key priority areas are Quality Assurance and Recognition, Engaging Business and Industry in Education, Balanced Mobility, and Lifelong Learning including TVET. All these priorities must be understood in the context of cooperation and collaboration between the Asian and European member countries. For example, balanced mobility refers to the asymmetrical number of student flows between Asia and Europe, while engaging business and industry tackles the development of 21st century skills to increase employability and entrepreneurship amongst students. The AEP resulted in 21 collaborative initiatives, It operates on the political level and on the level of stakeholders. At the political level, senior education officials discuss policy orientations, including implementation of initiatives, programs, and projects. Stakeholders include all institutions, organizations, interest groups, and other entities who may or may not be ASEM members or partners. Political leaders and stakeholders interact with one

another and take part in various activities that promote ASEM's work program. Currently, ASEM is working on 'Strategy and Vision 2030' to define the the forum's future directions.

### 5.5.3. Discourse topoi

The following sections focus on the topoi that link ASEAN to the CHEd's internationalization strategy. One of the major arguments put forward in this chapter is that the ASEAN integration is in itself a discourse strand of internationalization and, at the same time, a major discursive event that has influenced the pace and tone of the discourse on internationalization in Southeast Asia. In the Philippines, it provided the impetus for reforms in the educational system. For example, on a website dedicated to higher education policy programs related to the Enhance Basic Education Act of 2013, the CHEd affirmed the significance of the ASEAN Economic (AEC) integration to this substantial educational reform:

> It is a season of unprecedented change for Philippine education, shaped by aggressive reform measures from within, with the full implementation of the new K to 12 system in 2016, and rapidly advancing movements from without, as the ASEAN Economic Community in 2015 (CHEd, n.d., para. 1).

Although the reform targeted basic education, it had a significant impact on the whole education system. In the above phrase, the integration of the ASEAN economies into one community is depicted as one of the exogenous elements that is altering the country's education landscape. In their discussions on the education of future librarians in the Philippines, Ramos-Eclevia and Maestro (2016) link the CHEd's reforms to the AEC integration:

> As the lead Philippine agency, CHED continues to work toward achieving a harmonized higher education environment in the region that will ultimately contribute to the realization of an ASEAN Community in 2015 (p. 317).

Indeed, the CHEd considers the AEC Integration as one major political and discursive development that necessitates appropriate responses. To this end, CHEd launched a series of initiatives to help Philippine higher education prepare for AEC 2015.

### 5.5.3.1.    Topos of "Reality"

In Section 5.3.2.1., I point out the complexity of using the term reality to describe a topos of a discourse. In this section, the Topos of "Reality" maintains the definition and the argumentation scheme as described the previous section. The use of the socially constructed "ASEAN

Reality" in this discourse strand also reflects the idea that many academics and policy makers in the Philippines use to refer to ASEAN. In fact, one high ranking official from the CHEd stated that internationalization is the country's response to ASEAN integration, arguing that ASEAN "is the immediate environment" in which the Philippine higher education actively participates (Resource Person 7). As a senior administrator of a public university stated, ASEAN is the "space" where they can strategically position themselves (Resource Person 8). The Topos of "Reality" also relates to ASEAN as a discursive event in itself; that is, a discourse that influences the development of discourse (Jäger & Maier, 2016, p. 124). To reiterate, the Topos of "Reality" is formalized as follows:

A:      Reality is as it is.
CR:     If reality is as it is, a specific action / decision should be performed / made.
C:      Thus, a specific action / decision should be performed / made.

This could be translated as follows:

A:      Reality is that the Philippines is part of ASEAN.
CR:     If the Philippines is part of ASEAN, then a specific action / decision should be performed / made.
C:      Thus, a specific action / decision should be performed / made.

In other words, being a part of ASEAN demands policy actions from the CHEd and from the national government. The following segments illustrate how the Topos of "Reality" in the ASEAN discourse is articulated in the documents examined for this study. In an official statement released in 2014 on the CHEd's standpoint on changing the academic calendar in the country, former Chairperson Licuanan stated:

> CHED believes that it is important to think about how Philippine higher education can best respond to ASEAN Integration in 2015 (CHEd PR, 2014a).

Licuanan raised two main issues: the quality of education programs and thus the quality of graduates and compliance with the requirements of the ASEAN Qualifications Framework. Both issues point to employability and competitiveness of Filipino graduates vis-à-vis fellow graduates from other ASEAN countries. Additionally, this signifies the relevance of Mutual Recognition Agreements that promote mobility of professionals in the region (see Section 2.2.2.5). In the above statement, ASEAN integration is the country's immediate reality; it brings about fundamental issues that necessitate a response from the Philippine higher education

sector. In CMO 55, the CHEd first mentions ASEAN, specifically the ASEAN Economic Community, in the background and context of its internationalization policy. For example:

> In particular, the integration of ASEAN Member States enlarges the economic space for its members by expanding markets for goods and services. The opportunities and challenges opened by this integration are the backdrop of the Philippines' comprehensive and far-reaching policy reforms that include the internationalization of higher education (CMO 55, 2016, p. 1).

> Against the backdrop of the ASEAN Economic Community, the country's national plans, the imperatives of labor and student mobility as well as vigorous academic exchanges, internationalization is integral to the Commission on Higher Education's reform (CMO 55, 2016, p. 1).

These statements depict ASEAN not only as an extension of the country's economic "space" but also the general condition that, again, requires policy response, such as comprehensive education reforms that include internationalization. From this purview, it is evident that the AEC plays a critical role in understanding the internationalization efforts in the Philippines. Although it is not the sole rationale for policy formulation, the CHEd emphasizes its relevance as the immediate context and the general situation in which the reforms occur. In particular, mobility and linkages between institutions in the region are major policy responses to ASEAN integration. In relation to the institutionalization of the Philippine Qualifications Framework, former Chairperson Licuanan stressed the crucial relevance of comparability of qualifications within the region:

> This Act legislated the Philippine Qualifications Framework-National Coordinating Council (PQF-NCC) which is the body responsible for institutionalizing the PQF and spearheading its link to the ASEAN Qualifications Reference Framework (AQRF)—a regional framework that functions as a translation device to enable comparisons of qualifications across ASEAN Member States towards greater mobility of students and professionals within the ASEAN region (CHEd PR, 2017h).

In this statement, reference is made to Executive Order (EO) No. 83, a national policy signed in 2012 which institutionalized the Philippine Qualifications Framework (PQF) and established relevant bodies needed to implement the law. The PQF describes the levels of educational qualifications and sets the standards for qualification outcomes. It also synthesizes the various aspects of the major education reforms in the country, such as the K to 12 law. More

importantly, in the above statement, the need for comparability of qualifications to promote intra-regional mobility justifies the creation, institutionalization, and implementation of the PQF. Once more, it underlines the profound impact of ASEAN integration – specifically the AQRF – in restructuring the architecture of the qualification system of the country.

### 5.5.3.2.        Topos of Commitment

The Topos of Commitment builds on the Topos of "Reality" and is based on the argument of commitment (Walton et al., 2008, p. 335):

A:      A has committed itself to propositions Y.

CR:     If A has committed itself to propositions Y, then A has to perform actions that show its commitment to propositions Y (evidence of commitment).

C:      Thus, A needs to fulfill its commitment to propositions Y.

In other words:

A1:     The Philippines is a signatory to the ASEAN charter.

A2:     ASEAN is the Philippines' immediate context and reality.

CR:     If the Philippines signed the ASEAN charter and ASEAN is the immediate context and reality, the Philippines needs to fulfill its commitment to the ASEAN charter.

C:      Thus, the Philippines needs to take action to fulfill its commitments to the ASEAN charter.

Within the ASEAN discourse strand, the Topos of Commitment is more applicable than the Topos of Law or Topos of Authority. For one, the CHEd uses the term commitment to highlight the relevance of ASEAN to its policy direction. Also, the CHEd refers to specific internationalization initiatives and mechanisms as a sign of its commitment to ASEAN integration. The Topos of Commitment also recognizes the delicate character of cooperation between the ASEAN member countries. For instance, in CMO 62 from 2016, on policies, standards, and guidelines on Transnational Education (TNE), the CHEd expresses its commitment to its agreements:

> The Commission recognizes the Philippine commitments to bilateral, regional and multilateral trade agreements such as the General Agreement on Trade in Services and the ASEAN Framework Agreement on Services (CMO 62, 2016, p. 1).

The above phrase also indicates intertextuality with the ASEAN Framework Agreement which stresses comparability of qualifications to facilitate the intra-regional mobility of skilled workers in selected professions (see Section 2.2.2.5). In CMO 11 (2014) specifying guidelines for participation in the ASEAN International Mobility for Students (AIMS) program, the CHEd stresses its commitment to its own roles and functions in the regional integration:

> The Commission, as one of the agencies responsible under the Education area of the ASEAN Socio-Cultural Community – one of the three pillars of the ASEAN Community 2015, reaffirms its role on contributing to regional integration (p. 1).

In a follow-up policy document (CMO 19, 2015) detailing the operating guidelines for the implementation of the AIMS program, the CHEd also recognizes the Letter of Intent indicating commitment by all member countries to the implementation of AIMS (p. 1). In another policy document, CMO 22 (2016), which sets the guidelines for foreign scholarships during the K-12 transition period, the CHEd notes that the policy is:

> […] in line with joint action plans and bilateral cooperation agreements signed by the Philippines with its foreign counterparts, giving rise to and facilitating the mutual exchange of faculty both within the ASEAN region and beyond (para. 1).

In the core policy document CMO 55 (2016), the CHEd articulates the country's commitment to ASEAN in several instances, such as in Article IV which details the principles, policies, and strategies of the policy, specifically in Sections 5.5 and 5.6.

> The Philippines adheres to the principle of ASEAN cooperation and is committed to establish an ASEAN Socio-Cultural Community that is people-centered and socially responsible with the view to achieving enduring solidarity, unity and a common identity with the people of ASEAN (p. 5).

> The Philippines is further committed to facilitating people mobility in ASEAN through higher education exchanges across member states, as embodied in the Master Plan for ASEAN Connectivity 2025 (p. 5).

The CHEd's commitment is further reiterated and explicated in Article V which discusses the policy on academic mobility.

The CHED shall encourage and support HEIs' [*sic*] participation in ASEAN and other regional and global initiatives on internationalization. In particular, participation in regional academic mobility schemes shall be promoted: these include the ASEAN University Network (AUN), the ASEAN International Mobility for Students Programs (AIMS) and the University Mobility in Asia and the Pacific (UMAP), among others (p. 11).

Evidently, the focus is on the various mobility schemes developed by and for ASEAN member countries. Moreover, the above statements are textually linked to the ASEAN Socio-Cultural Community Blueprint as well as the Masterplan on ASEAN Connectivity 2025.

### 5.5.3.3.    Topos of Advantage / Usefulness

The Topos of Advantage / Usefulness is also evident in the discourse strand on ASEAN, particularly the topos subtype of 'pro bono publico' (see Section 5.3.2.4; Reisigl & Wodak, 2001, p. 75). In this discourse, particular benefits and advantages – for the public good – are perceived to be concomitant to the ASEAN integration.

A:    Action X is advantageous or useful to us / for the public.

CR:    If action X is advantageous or useful to us / for the public, then it should be carried out / implemented.

C:    Thus, action X must be carried out / implemented.

This could be applied to two conditions:

A:    ASEAN integration is advantageous or useful to us.

CR:    If ASEAN integration is advantageous or useful to us, then it should be carried out / implemented / supported.

C:    Thus, ASEAN integration must be carried-out / implemented / supported.

and

A:    Intra-regional mobility is advantageous or useful to us.

CR:    If intra-regional mobility is advantageous or useful to us, then it should be carried out / implemented / supported.

C:    Thus, intra-regional mobility must be carried out / implemented / supported.

The Topos of Advantage / Usefulness emphasizes the assumed benefits from a particular policy action. In this case, it refers to the benefits of achieving ASEAN integration, and in

particular, of implementing intra-regional mobility through mechanisms that focus on education. This is evident in CMO 11 (2014), which provides the guidelines for participation in the ASEAN International Mobility for Students (AIMS) Program for selected higher education institutions. Stating the principles of the guidelines, specifically Article 1, the CHEd pointed out they:

> [...] ensure that further opportunities brought about by the impending ASEAN integration will help in improving the Philippine higher education system.
>
> The ASEAN International Mobility for Students (AIMS) promotes regional integration through student mobility. Student mobility is recognized as an essential element in fostering academic cooperation which shall lead to the development of a viable Southeast Asia regional higher education area.
>
> Academic and cultural sharing – an effective generator of rich intercultural experiences – is recognized as an essential tool not only in promoting ASEAN identity but also in readying the ASEAN peoples for the challenges of globalization and regionalization (Article 1, p. 1):

The first part of this citation refers to quality issues in higher education, while the second part denotes expected benefits from mobility within the region, not only for ASEAN integration, but for achieving the ASEAN common higher education space. Similarly, the third element above indicates academic linkages or cooperation as necessary in creating an ASEAN identity amongst participants and in coping with the challenges of globalization and integration. In other words, mobility and linkages are viewed as essential in achieving the benefits of a successful ASEAN integration. A similar example of the benefits of mobility can be found in CMO 55 (2016):

> Mobility is one of the key strategic elements of cooperation leading to the development of a higher education common space in Southeast Asia (p. 11).

Similar patterns can be seen in the press releases, particularly those from 2017, which also coincided with the Philippine chairmanship of the 31st ASEAN Summit. For instance, to promote the CHEd's leadership during the 11th Southeast Asian Higher Education Senior Officials Meeting (SEA-HiEd SOM) and 2017 Southeast Asian Higher Education (SEA-HiEd) Forum on Leadership and Governance, former Chairperson Licuanan:

[…] pointed out the role of the ASEAN community in bringing a more equitable and sustainable development to the people of the region with education and lifelong learning as major strategies (CHEd PR, 2017b, para. 4).

In this statement, Licuanan adds another layer to the benefits of the ASEAN integration, namely equity and sustainability as related to ASEAN's development. In another press release, this time on the First ASEAN Student Mobility Forum in Manila, the heading, which the CHEd borrowed from the ASEAN's slogan, read:

"One ASEAN identity through student mobility" (CHEd PR, 2017b, para. 1).

This one-liner powerfully summarizes the essence of student mobility for the region. Two statements further fuse the benefits of student mobility with broader ASEAN goals:

Deputy Secretary-General for ASEAN Socio-Cultural Community, His Excellency Mr. Vongthep Arthakaivalvatee also vouched for student mobility as powerful lever for growth and integration of a region (CHEd PR, 2017b, para. 6).

Day one keynote speaker Kate Ramil, President for Southeast Asia Region-Erasmus Mundus Association, recounted her experience as a graduate student in Europe and how this changed her life and paved for a fulfilling career (CHEd PR, 2017b, para. 9).

Undoubtedly, student mobility is perceived to be beneficial to member countries and individuals too. Correspondingly, mobility requires comparability of qualifications. This is the gist of another of the CHEd's press releases promoting the conference, "Mobility in ASEAN: Referencing and Recognition of Qualifications," where Licuanan stated:

"At the end of the day, developing and further refining our qualifications system will compel us to mobilize stakeholders. Such review can only redound to reforms that aim to fill many gaps and, in the process, continuously transform our education system and the world of work" (CHEd PR, 2017h, para. 5).

The above statement also indicates the strategy of mitigation through the use of the verb "compel" in relation to mobilizing higher education stakeholders, particularly those from the sector, in transforming the education system

### 5.5.4. Summary

Based on the statements presented and discussed in this section, ASEAN provides the immediate context for the education reforms in the Philippines. It is the "ASEAN reality" in which the Philippines operates, particularly regarding the internationalization of its higher education. Member countries are expected to commit themselves to the various initiatives aimed at establishing ASEAN integration and the ASEAN Higher Education Common Space. Academic linkages, particularly those that include intra-regional student mobility are expected to contribute to these goals, and thus bring benefits to the region. The discourse on ASEAN also indicates interdiscursivity with the discourse strand in marketization discussed in Chapter 5.3, not least in relation to the envisioned free flow of people within the region. The topoi discussed in relation to the ASEAN discourse strand could be understood as topoi that correspond to each other. The graphic below illustrates this linkage and summarizes the ideas that characterize the ASEAN discourse strand in the internationalization of higher education in the Philippines.

Figure 12: Topoi embedded in the discourse on ASEAN
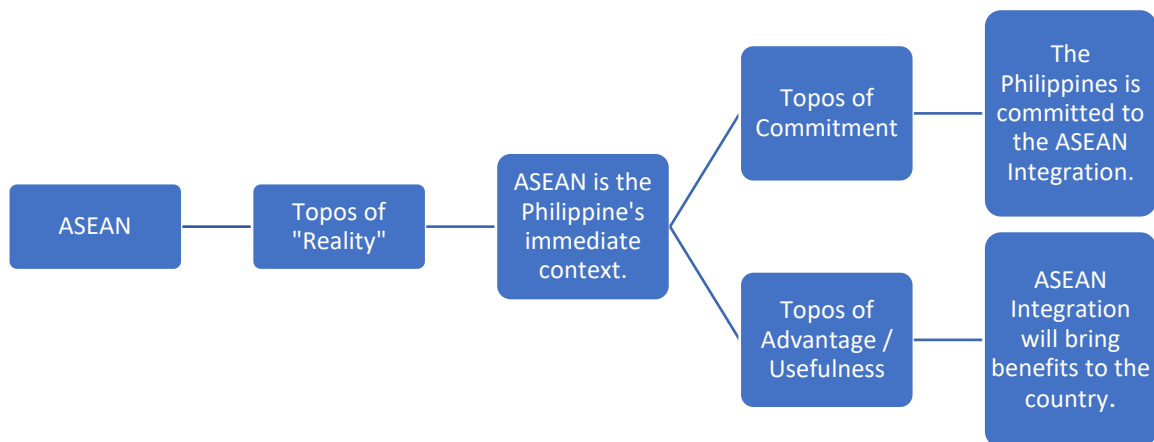
## 5.6. Discourse strand: Nation

The discourse strand on nation is so entangled that it requires untying several conceptual knots, before any attempts at explaining the discourse can be made. Reference to the nation and national development is ever-present in policy discourses on internationalization and they seem to appear in tandem with other vague concepts such as competitiveness, lifelong learning, globalization, or citizenship. In fact, policy orientation that prioritizes the nation and national development – broadly defined – seems to be a global trend. What follows below is a review of the concept of nation, albeit brief and in broad strokes, and of the topoi that sustain the discourse on nation in the Philippines. The common thread that runs through this study is the stance that discourse, ideas, and ideologies are socially constructed. This remains true in discussing the notion of nation. This research acknowledges that "nations and nationalism are social phenomena, not an article of faith" and must be examined in view of the state of contemporary societies (Ichijo & Uzelac, 2005, p. 4). Thus, they are considered as social facts that have material and practical consequences. On a similar vein, discourse and its concomitant discursive strategies mobilize the policy-making process.

### 5.6.1. Definition

Despite the language of globalization which emphasizes a blurring or disappearing of national borders, the concept of nation remains influential in shaping our understanding of societies. As Ichijo and Uzelac (2005) contend, "our world is still deeply embedded in the language and practice of nations and nationalism," regardless of how these are defined. Thus, "nations and nationalism are mutually reinforcing social and political phenomena" (Harris, 2009, p. 46). Scholars agree that the idea of a 'nation' has manifold tangible and intangible elements: history, religion, language, ethnicity, geographical frontiers, territorial claim, a sense of belonging or community, cultural traditions, and more. However, when discussed in singularity, none of these concepts is sufficient to explain the essence of 'nation' as an idea and a social fact. Already in 1882, Renan pointed out the dangers of simplifying the definition of the term, arguing that it is an "idea that seems clear, but lends itself to the most dangerous misunderstandings" (Renan, 1882/2018, p. 247).

#### 5.6.1.1. Nation, nationalism, and nation-state

The term state refers to a legal independent political institution which "exercise(s) a monopoly of coercion and extraction within a given territory" (Smith, 1992, p. 61). The word nation is much more difficult to define. It has roots in the Latin term *natio* and originates from the word *nascor*, which means birth or be born, to start, originate, or arise. In 1882, Renan asked the now famous question: "But what, then, is a nation?" The discourses and debates on the concepts of nation and nationalism have a long tradition. Özkirimli (2017) traces their origins

in political and ideological thoughts of philosophers, historians, and social scientists dating back at least the end of the 18th century, although much of the writings during this period do not figure prominently in historical accounts because they are not regarded as theories of nations and/or nationalism *per se* (p. 11). Key philosophical and ideological concepts such as individual freedom and freewill by Kant; self-determination, citizenship, and education by Rousseau; Renan's idea of a nation as an everyday plebiscite; Herder's emphasis on language and national cultures; Marx and Engels' treatise on the relationship between nationalism, class struggles, and capitalism; Bauer's community of fate; Durkheim's emphasis on religion as a moral community, on the role of education in instilling nationalism and *conscience collective* (shared sentiments in a community); or Weber's stress on the role of politics in defining the nation; all these bear their imprints on how the ideas of nation and nationalism are understood today (Özkirimli, 2017, pp. 11-32; Podoksik, 2017; Breuilly, 2010).

According to Langewiesche (2000), there are two competing approaches to understanding the concepts of the nation and nationalism in Europe (particularly from the historical perspective of central European states) and in states whose histories are linked to Europe. One is essentially political and focuses on the political institutions and political as well as economic upheavals; the other one focuses on the formation of ethnic groups and examines their social and political transformations throughout history (p. 15). Consequently, each of these approaches has its own methodologies and points of departure in examining the origin and function of the nation and nationalism. However, scholars from both sides (with the exception of some primodrialists and perennialists) do concur that contemporary ideas of a nation are, indeed, modern: the grounding of the nation and the nation-state as the ultimate ideals of societal values began in the 19th century (see also Calhoun, 2005). This coincided with the fundamental changes in political and social relationships within the European societies. This also implies that the evolution of nationalism as a widely accepted ideology for social and political mobilization only became relevant in the 19th century, albeit on different scale and progression (p. 17). Langewiesche (2000) stresses that when one speaks of the 'age' of nationalism, nations, and nation-states in the 19th and 20th centuries, one refers to the establishment of the nation as the supreme ideal or value for which one fulfils the ultimate demands and makes the noblest sacrifices, regardless of one's worldviews (p. 21). Historical research has shown that elements of these ideas have continued to the present. According to Langewiesche (2000), there are four major lines of historical continuities:

- The territory as the fundament of a nation

Langewiesche (2000) stresses the role of violence in the formation of nation-states, regardless of the epoch. The 'holiness' of national territory justifies every act of war against those who

attempt to 'desecrate' this 'sacred' and inviolable element of the nation (p. 23). The Peace Treaty of Westphalia in 1648 marked the consolidation of Europe's long process of transition to sovereign states. This historical moment is commonly considered as the source of territorial boundaries of 'primary' nation-states in Europe, as well as the origin of the ideas of sovereignty (Benjamin, 2015). According to Philpott (2020, para. 12), one of the core elements of a sovereign state is the state's supreme political authority over a geographical territory. What radically changed in the 19th century is the notion that no state can occupy another state without national political justifications. However, this only applied within Europe, since territories outside European boundaries were considered open for colonization (Langewiesche, 2000, p. 24). In addition, globalization theories that predicted the collapse of the nation-state and of boundaries are now being contested. As Widdis (2019) argues, borders are more fluid and dynamic than before; they are always being (re)constructed, always in the process of becoming (p. 574).

- The political-state organization, not the people, is the core of nation building

The 19th century metaphor based on the idea that the nation has 'awakened' conveys the idea that the nation is anchored in the people, and is therefore eternal. This has obscured the observation that ethnogenesis follows the formation of power, not the other way around (Langewiesche, 2000, p. 24) Nations are built around core sources of power. However, this took a different quality and dynamic in the 19th century when nationalism became the mechanism for creating institutions (p. 25).

- National myths

National myths and historical imaginings justify the claim for national self-determination and independence, and clearly demarcate one nation from other nations. This implies that the creation of "us" against "them" or "we" against "others" is an integral part of nation-building, even to the extent that it stirs xenophobia. The task of myths in nation-building and in nationalism is to 'dilate' or stretch the chronology of history so that one's own nation can be situated into the realm of mythical distance. This aspect of understanding the nation must be considered to avoid falling into the trap of analysing the nation within a nationalist discourse. The interpretation of history, together with state rule and its social institutions, is one of the main mechanisms of nation-building (Langewiesche, 2000, p. 26).

- War as "Father" of nations and nation-states

This dimension correlates with the first dimension – the demarcation and defence of the national territory. This was a central element of nation-building. However, state formation must not be equated with nation building because the transition from the state to the nation-state

only commenced in the late 18th or 19th century (Smith, 1988, p. 11; Langewiesche, 2000, pp. 27-28). Moreover, women's participation in war campaigns was limited to their 'mother' roles which defined or blocked the role of women in the nation-building process. Langewiesche argues that this might be the reason why women's organizations have so strongly emphasized the service of women to the nation in their struggles for equality (2000, p. 27). The contemporary nation-state has inherited and continued this tradition of violence. But war now needs to be justified since the nation-state has become the primary institution of political organization with the highest degree of legitimacy (p. 31).

Nation and nationalism as fields of study are complex and sinuous. In education, they occur not only as topics within a subject to be taught or as set of values to be ingrained in the students, but they are part and parcel of everyday practices in curriculum design and teaching routines. The next sections offer an illustration of the study of nation and nationalism, and as such, does not provide a detailed analysis, rather it illuminates broad strands of thought. For an overview of the salient ideas that permeated the debates and discourse on the nation and nationalism, see Özkirimli (2017). While Langewiesche (2000) offers a historical account and analysis from a European perspective, Calhoun (2005) discusses the topics in relation to social theory.

### 5.6.1.2. Mainstream paradigms

The period from 1918 to 1945 ushered in nationalism as a legitimate field of academic study, particularly amongst historians. However, their work focused on national narratives that emphasized moralistic perspectives on nationalism, and on nationalism as an expression of the nation, without clearly defining the relationship between the nation and nationalistic sentiments (Breuilly, 2010, p. 1; Özkirimli, 2017, p. 32). Theorizing about the nation and nationalism flourished between 1945 and 1989, the period when "canonical" texts were published, and theoretical perspectives became diverse. These key texts can be categorized along three main paradigms that explain the essence of the nation and nationalism: primordialism, modernism, and ethnosymbolism. These paradigms are characterized by intrinsic variations, although they do share some core common denominator. Each paradigm operates within its own ontology of nationhood and nationalism.

### 5.6.1.2.1. Primordialism

According to Ichijo and Uzelac (2005), this is the oldest paradigm that has been used to examine the concepts of nations and nationalism. It views a nation as organic in nature, a "naturally occurring social grouping" defined by cultural markers such as language, as well as shared religion, tradition, and history (p. 51). Nations are part of human nature, and as such, have existed from time immemorial. It does not negate though the fact that a nation can also

emerge or "awaken" as an entity (p. 52). The primordialist approach is based on sociological and anthropological studies of societies, especially those that focus on social relations and religion (Grosby, 2005). It focuses on the primordial, or the inexplicable, power of nations to command loyalty from their members. There are four ways to explain primordial ties: nationalist, sociobiological, culturalist, and perennialist, whereby perennialist could be considered as a milder form of primordialism (Özkirimli, 2017, p. 52).

For nationalists, nationality is an inherent attribute of human beings. The nation is viewed as a "mystical, atemporal, even transcendental entity, whose survival is more important than the survival of its individual members […] at any given point in time" (p. 54). The sociobiological approach, as suggested by van den Berghe, argues that ethnicities are extended, large kinships. Thus, a nation is a "politically conscious ethnie" (Özkirimli, 2017, p. 57) and as a result, nationalism arises when the sense of belonging to an ethnie is transformed into claims for statehood by "virtue of being an ethnie" (Özkirimli, 2017, p. 57; Ichijo & Uzelac, 2005, p. 53; van den Berghe, 1981, p. 61). Scholars that follow the culturalist approach assert that community membership is based on the members' perception of the assumed 'givens' of social existence, that is the subjective feeling of shared ethnicity, culture, and social practices within a defined territory; thus the focus is on the role of perceptions in examining national ties (Özkirimli, 2017, pp. 51-60). Perennialists do not agree with the view of a nation as a natural fact. But, while some recognize the long history of some nations, going as far back as to antiquity, others emphasize how nations have appeared in every period of history around the world. For perennialists, nations have existed for as long as societies have (Grosby, 2005).

This paradigm has been criticized on several grounds. For one, it is unable to directly address the question of how emotional ties operate and how they are reproduced (Billig, 1995, p. 7; Ichijo & Uzelac, 2005, p. 54). Also, it views ethnic and national identities as static facts of nature, despite the dynamic and fluid nature of social relations. Taken to the extreme, it suggests an essentialist view of national identities, an idea that is no longer tenable in the face of research on complex processes of identity formation. Moreover, it fails to offer an explanation of unsuccessful nationalist movements, despite strong ties within the nation (Özkirimli, 2017, pp. 62-66). In view of challenges in gathering evidence to support the tenets of primordialism, Coakley (2018) suggests considering their theoretical propositions as an element or ingredient of nationalism, not as an explanation.

### 5.6.1.2.2. Modernism

Modernists stand in opposition to the primordialists. Their perspective is swayed by modernization theories; that the nation and nationalism are modern inventions.

> […] they are the products of specifically modern processes like capitalism, industrialization, urbanization, secularism and the emergence of the modern bureaucratic state. In that sense, modernists are making both a chronological and a structural claim. They do not simply hold that nations and nationalism are historically novel; they also argue that they have become a sociological necessity in the modern world" (Özkirimli, 2017, p. 81).

Many of the influential texts on nations and nationalism come from this tradition, such as Breuilly's *Nationalism and the State* (1985), Gellner's *Nations and Nationalism* (1983), Anderson's *Imagined Communities* (1983) and the volume edited by Hobsbawm and Ranger entitled *The Invention of Tradition* (1983) (Özkirimli, 2017, p. 47).

For example, Gellner (1983) asserts that neither culture nor will or consent alone is sufficient to define a nation. It is the convergence of both, but only under general social conditions that permit the development and sustenance of a high culture – mediated by a common language and transmitted through mass education – that permeates the entire population. Gellner's view of the nation as a political unit presupposes homogenous cultural identity and emphasizes the role of education as an institution of nation-building, and by implication, of institutionalizing nationalism. Consequently, nationalism is a political principle which states that congruence between the political unit and national unit exists; thus, it is a theory of political legitimacy (2006, p. 1).[25]

Defining nations and nationalism as modern phenomena also implies that they must be created or constructed through discourse (Billig, 1995, p. 11; Wodak, de Cillia, Reisigl & Leibhart, 2009). For instance, Hobsbawm (1992), following Gellner, perceives a nation as a social entity, but only in relation to a modern nation-state.[26] In other words, nations are a modern construct based on what Hobsbawm and Ranger (1983) coined as "invented traditions."

> 'Invented tradition' is taken to mean a set of practices, normally governed by overtly or tacitly accepted rules and of a ritual or symbolic nature, which seek to inculcate certain

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[25] Topić raised critical questions on Gellner's theories on nations and nationalism (2011). See also Anderson (2006), on the drawbacks of Gellner's definition. For a summary of criticisms on Gellner's theory and his respective responses, see Breuilly (2006).
[26] See Connor (2005) on the problems with defining the nation in relation to the modern nation-state.

values and norms of behaviour by repetition, which automatically implies continuity with the past (Hobsbawm, 1983, p. 1).

He defines the nation and its associated phenomena, such as nationalism and the nation-state, as a "recent historical innovation" which consists of constructed symbols or "tailored discourse," for example on the nation's history or identity (pp. 13-14). Invented traditions in this sense legitimize group membership and secure group cohesion (p. 9).[27]

Breuilly (2005) perceives a nation as a political community driven by common struggles for equality and recognition of rights, privileges, and status within a political territory. Historical circumstances, or the process of negotiations between rulers and members of their territories, that formed modern political institutions also gave rise to the political notion of the nation; thus, nationalism is a form of politics, particularly opposition politics (pp. 65-66).

Anderson (2006) coined the phrase "imagined political community" to refer to a nation (p. 6). Following Renan (1882/2018), Anderson argues:

> It is *imagined* because the members of even the smallest nation will never know most of their fellow-members, meet them, or even hear of them, yet in the minds of each lives the image of their communion (2006, p. 6; italics in original).

In this sense, imagined is understood to be limited and sovereign. It is imagined as limited, because members of a nation have finite boundaries, not only in physical terms, but also in terms of membership or who can and cannot belong to the nation. It is imagined as sovereign because it emerged as a response to political and social circumstances during the age of Enlightenment and Revolution that delegitimized claims to divine provenance of rulers. Finally, it is imagined as a community, for a nation "is always conceived as a deep, horizontal comradeship" nourished by national imaginings or stories (Anderson, 2006, pp. 6-10).

### 5.6.1.2.3. Ethnosymbolism

According to Smith (2015), the ethnosymbolic approach to the study of nationalism developed as a response to both modernism (particularly its elite-oriented accounts of nationalism) and some variations of primordialism and perrenialism. Ethnosymbolism foregrounds the cultural elements of a nation, such as its myth, memory, value, tradition, and symbols and recognizes the ethnic identities and communities that form the basis of some modern nations. It examines

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[27] See Anderson (2006), on the conflation of 'new' and 'old' in forging national memory and forgetting aspects of history.

the historical development of ethnic communities and emphasizes cultural and social ties as well as the prestige amongst those who share the cultural identity. For Smith, it is essential that the study of nationalism is grounded in the historical evolution of ethnic communities and the role played by cultural elements. Smith (1992) differentiates between a 'civic' model and an 'ethnic' model of a nation. The 'civic' nations are represented by the Western states whose core elements are national territory or a homeland, democratic constitutional arrangements, and mass, civic culture that binds the citizens. The 'ethnic' nations are non-Western states who understand themselves in reference to their ancestry, cultural ties, and mobilization through folk culture. However, elements of these two concepts can be found in both Western and non-Western nations (p. 61). Smith (1992) draws his definition of a nation from the dimensions of a national identity. This constitutes five elements: a named human population; common myths and memories; a shared homeland, although the attachment to a homeland can also be symbolic; a common economy wherein legitimate members of the nation can participate; mass public culture; and common legal rights and duties extended to the nation's members (p. 60).

> […] the nation is a political community only in so far as it embodies a common culture and a common social will. This is why today no state possesses legitimacy which does not also claim to represent the will of the 'nation', even where there is as yet patently no nation for it to represent (Smith, 1992, p. 62).

Following this, nationalism, according to Smith (1992), is an ideological movement based on the premise of exclusivity of nations. It demands autonomy and self-identity of an existing or potential 'nation' (p. 61). Contrary to the modernist view of nation-building, Smith argues that nationalism as a movement often precedes the nation (1992, p. 66). Further, his definitions are meant to serve as a basic framework, an ideal-typical type, in understanding the nation in general. This is in contrast with the definition suggested by modernists which is only applicable to a particular model of a nation, that is the modern nation (Özkirimli, 2017, p. 159).

### 5.6.1.3.          Contemporary approaches

Since 1989, a new debate has been emerging as a response to the fundamental flaws in the theories that dominated the study of nation and nationalism of the past decades (Özkirimli, 2017, p. 47). In particular, several scholars point to the problem of methodological nationalism, or the tendency to view the nation as the natural unit of analysis; "[…] that is, placing nationalism within a national framework rather than leaving open to question the nation/nationalism relationship" (Breuilly, 2013, p. 6). The state is assumed to be the natural form of social organization that has complete control over its territory. In relation to nationalism, Breuilly (2013) further comments that "not every nationalism manages to achieve autonomy,

let alone a nation state, but that does not make those cases less real as examples of nationalism" (p. 7). Thus, methodological nationalism conflates not only nation and society, but also nation and nationalism. It fails to recognize non-state centripetal and centrifugal forces that influence the nation- and state-building processes, and thus falls short in situating the analysis within the wider context of transnational or global history (Wimmer & Glick Schiller, 2003, p. 577; Sager, 2016, p. 43; Özkirimli, 2017, pp. 47-48). What is more, the mainstream theories have not included micro-analyses to study the everyday, micro experiences of the masses or ordinary people and the process of reproduction that ensures the continuity of the national imaginaries. Too much focus on the nation/nationalism binary has overlooked other issues, such as gender, internal conflicts within a community, and experiences of ethnic minorities. Too much focus on Eurasia has produced research lacunae on emerging states, post-colonial states, stateless nations, states without a nation, multiple nations within a state, indigenous communities, and other communities outside of the mainstream European model (Özkirimli, 2017; Palmater, 2016; Peters & Mika, 2017). The mainstream theories also underplay the exclusionary basis of nationalism (Marx, 2003); or its positive impact on democracy and social progress (Calhoun, 2005).

Several scholars have taken up the challenge to fill in the gaps in theory and research. What follows below is only an illustration of two of these contemporary, alternative approaches to studying the nation and nationalism. For a detailed overview and critical discussions, see for example, Özkirimli (2017).

### 5.6.1.3.1. Banal nationalism

Coined by Billig (1995), *banal nationalism* refers to "the collection of ideological habits (including habits of practice and belief) which reproduce established nations as nations" (p. 6). It is the daily, visible but unnamed and unnoticed, banal but not necessarily harmless practices of nationalism. Assumptions about what is a nation, or about one's national identity are not created during crises or difficult times, but through small everyday practices. By illustrating how and when a national flag is put on public display, for example, Billig argues that *banal nationalism* occurs through a continuous "flagging" or reminding of nationhood (1995, p. 8). As he argues, nationhood structures the daily discourse in many little ways that go unnoticed. This implies that ideologies about the nation and national identities are so deeply embedded in contemporary ways of thinking that they appear natural, and thus remain unnoticed and unquestioned, even to those who oppose them (1995, p. 14). Hence, nationalism is part of the routine and the familiar, of the common sense or habits of thinking amongst the citizenry (2017, p. 333). On one hand, Billig suggests that national identity doesn't exist within the body but is embodied in the practices of social life, especially in the language used to think and talk about nationhood. In other words, national identity is accomplished through discourse; the nation is

imagined in the sense suggested by Anderson (1983) and is a crucial element of the wider ideological, discursive consciousness (Billig, 1995, p. 10). On the other hand, its (re)production is contingent upon collective narratives of remembering and forgetting, of imagining and repetition (1995, p. 10). What is more, identities are situated physically, legally, socially, as well as emotionally within a particular territory, or a homeland (1995, p. 8). Therefore, nationalism is endemic to and encapsulated within the ideas of a nation and/or a nation-state. Since nationalism permeates the consciousness, social scientists are not immune to it. On the contrary, they are part of its reproduction, and are thus not removed from the study of it (1995, p. 12; 2017, p. 335).

Billig's ideas on banal nationalism inspired other scholars to closely examine the discursive and material manifestations of the nation and nationalism, not only by established institutions, such as UNESCO, or the elites of a society, but also by 'ordinary citizens.' For example, the idea of *blatant nationalism* extends the concept of *banal nationalism* to examine the overt references to signs and symbols of nationhood (Benwell, 2014). Similarly, *everyday nationhood*, or *everyday nationalism* examines how:

> ordinary people think the nation, talk the nation, enact the nation, perform the nation, consume the nation – and of course reject, resist, ignore, and avoid the nation – all in ways that contribute to the reproduction and legitimation – or dismantling and undermining – of national forms of belonging (Fox & van Ginderachter, 2018, p. 546).

Thus, it diverts the focus to the agency of the masses, or the citizens, in engaging with the ideas of and about the nation (Antonsich & Skey, 2017).

### 5.6.1.3.2. Discursive formation

Following Anderson's concept of imagined communities, Calhoun (1993) argues that nationalism is a modern phenomenon and is a "discursive form for modern claims to political autonomy and self-determination" (p. 213). Here, Calhoun (2007) employs the term *discursive formation* in Foucault's sense (p. 151). Contemporary societies and individuals are deeply engaged with the discourse on nation on a daily basis, consciously or unconsciously. Through everyday language use, categories and assumptions about the nation are constituted and reconstructed (Calhoun, 1993, p. 214; 2007, p. 151). Nationalist rhetoric in the contemporary era thus creates a framework for defining the collective subjects, not only those who sympathize with nationalist sentiments, but also those who do not. It continuously reproduces the constructed links between the nation and the state, the substance of national identity, the parameters for national citizenship, and other corollary issues of nationalism. Thus, it is a

discursive formation that mobilizes discursive practices (Calhoun, 2007, p. 152). More important, nationalism for Calhoun should not be confined to its negative connotations but should also be understood positively. That is, nationalism can be useful in gaining collective support for public institutions and debates, for encouraging democratic political participation, and creating commitment to a collective self-empowerment (2007, p. 153). It also implies that a nation as a social reality is malleable; its cultural and political nature allows it to transform. Calhoun (1993) points out the contested nature of the definitions of nation and nationalism, noting how a specific definition privileges or discounts a certain perspective (p. 215). What is crucial is the subjective way in which members of a nation understand their sense of belonging and relationship to their nation. In other words, the concept of a nation cannot be defined objectively, because it requires self-understanding (Calhoun, 2005, p. 520). Nevertheless, Calhoun cites the following features of the rhetoric of nation, or claims made in the name of nations:

- defined territory or population, or both
- cohesion
- sovereignty or claims to sovereignty
- legitimacy from the 'people' or 'from below'
- popular participation in collective public affairs
- direct membership and equality between members
- shared culture (such as language, beliefs, values)
- temporal depth of the origin of a nation (similar to time dilation; see Section 5.6.1.1)
- common ancestry or source of common ancestral origins
- special/sacred historical relations to a particular territory (Özkirimli, 2017, p. 201).

The characteristics enumerated above are neither definitive nor exhaustive. What Calhoun emphasizes is the discursive nature of a nation and the claims made to mobilize people, to produce a collective identity, and ways of talking, thinking, and acting (Özkirimli, 2017, p. 201). Although nationalism is experienced differently by different groups, they are all marked by the modernity of its discourse. Moreover, the discourse on nationalism is international by nature. Calhoun (1993) thus argues that despite the understanding that nationalism is internal to a nation, it manifests differently and always has an external frame of reference (p. 216). It must be noted though, that nationalism is not a political doctrine, rather a basic way of talking, thinking, and acting; it is part of the imagining of the communities and the ways social realities are constructed. What is more, conceptualizing nation and nationalism as a discourse does not mean that they are not real; on the contrary, they are empirical phenomena and have real

consequences to communities and to their social and political relationships (Özkirimli, 2017, p. 203).

### 5.6.2. The Philippine "Nation"

Breuilly (2005) emphasizes the need to contextualize any theorizing on nation or nationalism, noting that the lack of context allows for too general an argument (p. 15). Much of theorizing on nation and nationalism takes it cue from the French Revolution. Von Güttner (2016) characterizes this historical event as the "mother of Europe's first modern revolution" (p. 34). Indeed, it has been the focus of an enormous body of work, both in academic spheres as well as in popular culture (Outram, 1989). In the Philippines, the French Revolution has been referred to as a source of inspiration for the *Ilustrados* (educated elite) in crafting their architecture of a Filipino nation-state and sense of nationalism (Zialcita, 1990; Anderson, 1998; Anderson, 2006). Unfortunately, efforts to establish the Philippine nation have yet to come to fruition, despite institutionalization of 'national narratives' in everyday social practices, especially in schools (Zialcita, 1990; Mulder, 2012; Kaufman, 2013). As discussed in Chapter 3, the country's colonial past is critical for understanding its current state. There are several outlooks from which to understand the enormous challenges that the Filipino community faces in the matter of nation-building. In Anderson's (1988) analysis, 'cacique democracy' or feudal-type socio-political structures controlled by the elites (the 'cacique landlords') have prevented the country's social and economic development. Similarly, patronage politics have perpetuated the existence and power of oligarchs since the establishment of the state under US occupation (see also Buendia, 1992; Bello, Docena, de Guzman, & Malig, 2009; Oh, 2016). Such a 'patrimonial oligarchic state' has an adverse impact at all levels of society:

> The persistence of political dynasties in the Philippines is acknowledged as bringing adverse effects on the country including the perpetuation of poverty and underdevelopment, the propagation of political and socio-economic inequality and the prevalence of massive corruption (Tadem & Tadem, 2016, p. 332).

As follows, Mulder (2012) reasons that Filipinos' collective culture is limited to one's immediate families and community. For one, there is no benefit to be gained from being loyal to the state, and while majority of Filipinos do take pride in their roots and culture, identification with own's ethnic community and region of origin is stronger than with the nation. In addition, there are enduring hostilities, particularly between the Christian government and the Muslims, and violence against indigenous groups. Kaufman (2013) thus rightly asserts that nationalism in the country is very weak, despite a rich source of historical narrative. One area in which ethnic tensions have been openly and intensively discussed in public, academic, and political spheres

is on the question of the national language. The emotional discourse on this particular subject reflects how language is interlaced with ethnicity, identity, community values, and consciousness. In the following sections, I present the outlines of this discourse by tracing its statutory contours. Through the discourse on national language, one can glean the major arguments for why nation-ness and nation-building in the Philippines is a complicated and arduous undertaking that is still yet to be fulfilled.

### 5.6.2.1.    Defining the national language

Depending on experts' definitions of what is a language, there are between 130 and 183 living languages in the Philippines. McFarland (2004) counts 118, Simons and Fennig (2018) identify 183, while the *Komisyon sa Wikang Filipino* (Commission on the Filipino Language) (2020) recognizes 130 distinct languages across the country. These languages are linked to the ethnic composition of the population. Also included in the count are non-indigenous languages such as English, Spanish, varieties of Chinese, Chabacano (a Spanish creole spoken in Zamboanga and in some parts of Cavite), and Arabic (mainly used in religious ceremonies in Islamic communities) (Simons & Fennig, 2018). Sixty percent of the population speak one of six major indigenous languages as their first language: Tagalog (23%), Cebuano (17%), Ilocano (8%), Ilonggo (6%), Waray (3%) and Bicol (3%) (Bravante & Holden, 2018, pp. 4-5). Although the majority of the Philippine languages belong to the Austronesian language family, a majority of them are not mutually comprehensible; they are substantially different enough that speakers of one language will not understand speakers of other languages (McFarland, 2004, pp. 59-63). With such ethno-linguistic diversity, designating a *Wikang Pambansa* (national language) that would serve as the lingua franca of the citizenry is a contentious and strenuous task.

Language has always been a marker of complex social and ideological relations in Philippine society. During the Spanish era, the teaching of Spanish was reserved for the Spanish elites and the indigenous *Principalia* and later on the *Ilustrados*. This divide was also evident during the revolution. While the *Ilustrados* wrote most of their essays and newspapers in Spanish, the *Supremo ng Katipunan* Andres Bonifacio, born from the lower echelons of the middle class, penned his sentiments in his first language, *Tagalog,* to reach out to the peasant members of the revolution. While the goal of many *Ilustrados* was to assimilate the Philippines into the Spanish motherland, the *Katipuneros* fought for their native motherland's independence from from Spain (Constantino, 2008).[28] This ideological difference has played out in the long colonial history of the country and still manifests itself in language debates, albeit the actors have

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[28] The *Katipunan* was a secret society based on the ideas of the Masonry. It launched the revolutionary movement against the Spaniards in August 1896. Its members were the *Katipuneros*. Called the Father of The Philippine Revolution, Andres Bonifacio was one of its founders and original leaders and the first president of the short-lived Tagalog Republic. He was literate in Spanish, English and French (Constantino, 2008, p. 162).

changed. When the US Americans took over the country in 1898, teaching English to the masses became one of the priorities, under the premise that the Spanish and indigenous languages were "overburdened" with divisive histories that made them inappropriate sources of linguistic unification. In such a case, English was framed as "the most ideal 'neutral' medium" that would assist the Philippines in achieving modernity, democracy, and self-governance (Osborne, 2020, p. 2). Indeed, English did not only replace Spanish as the language of the elites, but it also became a symbolic instrument of national progress and democratic goals. As a result, indigenous languages were categorized as ineligible as the lingua franca because they were deemed structurally insufficient or undeveloped in framing any discourse on nation-building and development. The US colonial government perceived the English-based, American-type mass education as a vehicle for forging the American ideals of national unification and citizenship, and these ideals could only be attained by English as the unifying language. It also implies, that one national language is necessary to create the Philippine nation. These ideas were reinforced by teaching practices that impelled the use of English in the school premises and during class time by punishing the use of indigenous languages, a practice that continues to present (Dawe, 2014). The practice of "English only" school rules subjected Filipino school children to massive indoctrination and Americanization campaigns, and practically devalued indigenous languages and identities. It also reflected the status of the natives vis-à-vis the colonizers. As far back as 1908, attempts at teaching several native languages were hindered not only by lack of materials and teachers, but because it was also viewed as a threat to the status of English. Moreover, it delayed the development of Philippine languages, particularly in mathematics, sciences, and technology (Smolicz, 1984, p. 54). As Donoso (2012) stated, "where Filipinos before were able to build a Republic, now they were told to start from ABC" (p. 3). Since the 1930's, the political elites have seriously and passionately engaged with what Tupas (2015) called the politics of 'p' and 'f', or the strategic acts of naming the national language; it is a conflicted semiotic of nation-building marked by ideological disputes amongst the elites in struggle for independence from English (and thus US American colonizers) and at the same time, for establishing a national language (pp. 587-589). The move to install Tagalog as the *Wikang Pambansa* failed during the 1934 Constitutional Assembly because of opposition from other delegates who were pushing for either Cebuano or Ilocano (Almario, 2015, p. 15). The first provision for a national language was finally articulated in the 1935 Constitution. It stated that:

> (T)he National Assembly shall take steps toward the development and adoption of a common national language based on one of the existing native languages. Until otherwise provided by law, English and Spanish shall continue as official languages (1935 Phil. Const. art. XIII § 3).

According to Bautista (1981), the hostility towards Tagalog was so fierce that foreign linguists at the University of the Philippines had to broach the idea of a 'universal approach' that would fuse native languages and dialects. This approach is evident in the vision of how the national language was to be developed, while, at the same time, keeping English and Spanish as official languages. To move the national project forward, the Commonwealth Government approved the Commonwealth Act No. 184 of 1936, which established the National Language Institute composed of then Commonwealth President, Manuel L. Quezon, and his six appointees who represented the major language groups in the country. Section 5.5 expressed one of its main responsibilities.

> To choose the native tongue which is to be used as a basis for the evolution and adoption of the Philippine national language. In proceeding to such election, the Institute shall give preference to the tongue that is the most developed as regards structure, mechanism, and literature and is accepted and used at the present time by the greatest number of Filipinos (1936 Commonwealth Act No. 184 §5.5).

The above clause basically limited the choices to a handful of principal languages. This political maneuvering resulted in Executive Order (EO) no. 134 signed in 1937, which declared that the national language of the country will be based on the Tagalog language. Nationalist Tagalog writers were already advocating its use as the language of instruction and national language in the early years of US American occupation. And although Tagalog was not spoken by the majority, the fact that it was perceived as the main literary medium, it was the language of President Quezon and other key political leaders at that time, it was (is) spoken in the capital city Manila, and Manila was (still is) the administrative and political center of the country, the Institute deemed it as the most developed language on the islands and thus most suitable as the lingua franca (Donoso, 2012; Tupas, 2015; Almario, 2015). It also established the dominance of the Tagalog-speaking group which triggered lasting ethnic animosity between Tagalogs and non-Tagalogs. As Tupas (2015) notes, the choice of Tagalog became associated with internal colonialism. The notion of 'Imperial Manila' continues to afflict the project of nation-building and many non-Tagalog speakers view political decisions from the national government in Manila as a demonstration of power of Tagalog-speaking policy-makers (p. 590). The Commonwealth Act No. 184 (1936), however, also reiterated the use of English as the primary medium of instruction (henceforth MOI) in public schools. Under the brief rule of Imperial Japan, the 1943 Constitution confirmed the status of Tagalog as the basis for developing and propagating the national language and removed the constitutional provision for the use of English and Spanish as official languages.

### 5.6.2.2. National 'language wars'

In 1959, the Department of Education, through Memorandum Order no. 7, 'de-ethnicized' Tagalog by renaming it *Pilipino* (Tupas & Lorente, 2014, p. 169). By this time, the experiment of teaching Tagalog (along with English) as a subject in schools nationwide was well underway (for better or for worse). Thus, then Secretary of the Department of Education José E. Romero, declared *Pilipino* as the proper name of the national language, since it had become national in scope and to be consistent with the spelling of the country's name *Pilipinas* (Almario, 2019, p. 5). Politically, this marked what Almario (2019) termed as the 'first huge crisis' in the country's enduring debates on language policy and the ensuing 'language wars' (p. 5). By 1973, the administration of former President Marcos rewrote the constitution under martial law. The changes in the clauses pertaining to the national language inflamed barely-healed wounds across ethnic groups. Article XV, Section 3 of the 1973 Constitution (amended in 1976, 1980 and 1981) states:

> 1. This Constitution shall be officially promulgated in English and in Pilipino, and translated into each dialect spoken by over fifty thousand people, and into Spanish and Arabic. In case of conflict, the English text shall prevail.
> 2. The National Assembly shall take steps towards the development and formal adoption of a common national language to be known as Filipino.
> 3. Until otherwise provided by law, English and Pilipino shall be the official languages (1973 Phil. Const. art. XV § 3).

This is *de facto* a historical moment as it created the synthetic language *Filipino* (in addition to the existing *Pilipino*) that, *per se*, nobody spoke. At this point, *Filipino* was essentially an empty signifier, having no basis and content to anchor to. According to Gonzalez (1974), this was again a political move to resolve the gridlocked discussions because participants in the meeting of the Committee on National Language could only accept a *Sprachmischung* as a compromise (p. 327). In this way, the universal approach broached by the experts in 1935 found a new meaning: to create a language using the base-rules common to all Philippine languages and fuse it with lexical items from as many languages as possible (p. 327). The change from 'p' to 'f' is also a symbolic act of representing those Philippine languages that lack the letter 'P' in their phonology (Gonzalez, 1998, p. 488). Although the idea of an invented language works in theory (for example, Esperanto), its feasibility in practice is questionable in the case of the Philippines. These clauses created confusion regarding the essence of what *Filipino* is, and the status of *Pilipino* vis-à-vis *Filipino* and English (Gonzalez, 1974). Almario (2015) notes that the term was so vague that many teachers and linguists had different interpretations of what and how it should be taught. This condition continues to the present, despite the definition

provided by the *Komisyon sa Wikang Filipino* (Commission on the Filipino Language) in 2013. Moreover, the 1973 Constitution differentiated between the national language and official languages: the former is a symbol of unity (from the perspective of Tagalog-speakers), while the latter is for practical purposes of official communication and documentation (Gonzalez, 1974, p. 333). It also sealed the status of English in the linguistic landscape of the country. Nonetheless, since *Filipino* was yet to be created, *Pilipino* and English became the MOI in the educational system. At the same time, *Pilipino* was introduced as an individual subject to be taught at all levels, while the regional languages were used as auxiliary languages in Grades 1 and 2. But even more important is the clear purpose of their usage: *Pilipino* in the social and cultural domains (social studies/social sciences, work education [home economics for girls, practical arts for boys], character education, physical education, music and arts); English for mathematics, science, and technology (Gonzalez, 1974, p. 336). This has severe repercussions not only in the status of the national language, but more importantly, on its further development and the development of other vernaculars. This bilingual education policy (henceforth BEP) further incensed the ethnic fissures and shifted the discourse from national language to language of education. Non-Tagalog speakers perceived the politics of 'p' and 'f' as an assertion of hegemony of the Tagalog language at the expense of other major languages in the country and, in effect, of the hegemony of the Tagalog ethnic group (Tupas, 2015, p. 593). As DILA (Defenders of the Indigenous Languages of the Archipelago) claimed, "Flipino is NOT our language" (DILA, 20019; emphasis in original).[29] From the start, the BEP has marginalized other major vernaculars in the country (Smolicz, 1984, p. 56; Gonzalez, 1998; Tupas, 2015, p. 594). Finally, the 1987 Constitution institutionalized the dominance of Filipino by declaring it as the national language and, alongside English, the official language as well as the language of education.

As a result, the Tagalog-based Pilipino, which by now has spread throughout the archipelago through the education system, became the basis of Filipino. In consonance with the 1987 Constitution, the Department of Education, Culture and Sports continued the bilingual policy from 1973, stressing the need of Filipinos to gain competence in both languages. The dichotomous view was that Filipino is "a linguistic symbol of national unity and identity" (Young, 2002), while English is necessary to "meet the needs of the country in the community of nations" (DepEd, 1987, para. 2). In other words, Filipino is linked to the local and national context, while English is international; Filipino is for nationalism, while English is for modernization (Tupas, 2015; Symaco, 2017). Based on the 1987 Constitution, the Macapagal-Arroyo government strengthened the status of English through Executive Order (EO) No. 210 published in 2003 which reiterated English as the second language in the educational system.

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[29] The acronym DILA means tongue in Tagalog.

Public and private secondary schools and higher education institutions were specifically encouraged to use English as the primary mode of instruction. Apart from the exclusion of other languages in the education system, one of the lasting impacts of BEP is what linguists call bilingual diglossia, or the situation wherein two (or more) languages compete or conflict with each other (Béord, 2016). Bilingual diglossia can cause learning handicaps in school children, particularly those who do not have mastery of either of the languages. Many educational experts have pointed out this issue in the Philippines since the beginning of the US occupation, stressing that forcing school children to learn subjects in a foreign language that they do not fully grasp creates gaps in educational outcomes that extend to university level. It results in semi-literacy in English and Pilipino and lack of literacy in their mother tongue (Smolicz, 1984, p. 56; Tupas & Martin, 2016).  Moreover, the introduction of Pilipino as the second language of teaching in elementary school worsened the condition for non-Tagalog speakers, particularly economically disadvantage children and those located in rural areas, as they were conscripted to learn in two languages neither of which they speak at home. "Hence there are children who finish school without being fully literate in any language" (Smolicz, 1984, p. 56). As Tupas and Martin (2016) note:

> […] in serving the economy, bilingual education contributed hugely to the tiering of English linguistic proficiencies which would then correlate with the kinds of jobs and economic opportunities available to different socioeconomic classes in Philippine society (p. 5).

Under the BEP, the discourse of English as a necessary social and economic good emerged as an attendant to access to quality education. As evaluations of the BEP showed, social class and geographical location correlated with successful outcomes, while the use of English and Pilipino as MOI was a strong mediating variable (Smolicz, 1984; Bernardo, 2004). Language thus became an instrument in perpetuating social and economic inequalities. On the other hand, the introduction of Pilipino as a MOI did help increase nationalism in the country, particularly in the 1960s and 1970s. The term became a symbol of resistance against the colonial influences of the US and drew from discourses that resisted the impositions of English (Tupas, 2015; Tupas & Martin, 2016). For example, Constantino (1970) called the education system under the influence of the U.S. the *The Mis-Education of Filipino* as it forced the Filipinas/os to learn a language and a way of life that were alien to their own. The purpose of their education was to become good colonials (p. 24). He criticized the subservient attitude of Filipinos and their distorted image of the 'foreign masters.' Thus, the function of education for Filipinas/os has become to correct these distortions (p. 36). Indeed, the institutionalization and use of Pilipino, and then later Filipino, as the national language also supported the

development of indigenous scholarship in social sciences, such as *Sikolohiyang Pilipino* (Filipino Psychology), *Pilipinolohiya* (Filipinology) and *Pilipinong Sosyolohiya* (Aquino, 2004; Erasga, 2017). At its core are the concepts developed through the intellectual movement *Pantayong Pananaw* ("From-us-for-us perspective") which articulates a distinct indigenous perspective of social sciences and, at the same time, critiques colonial discursive strategies prevalent in the historiography of the country which render the Filipinos as lacking an identity and seldom an active agent (Guillermo, 2003). It promotes a *talastasang bayan*, or a national discourse rooted in and significant to the Filipino society (Aquino, 2004, p. 105).

### 5.6.2.3. Mother-tongue based multilingual education (MLE)

In 2009, the Department of Education (DepEd) issued Order No. 74 institutionalizing the Mother-Tongue Based Multilingual Education from preschool to secondary levels, including in the Alternative Learning Systems.[30] It acknowledges national and international research findings on the positive outcomes on the use of the mother tongue as MOI. This was not the first attempt though. Experiments in the use of Hiligaynon as MOI in the Iloilo province proved successful enough, that further experiments were conducted and used as a basis for the Vernacular Education Policy from 1957 to 1974. During this period, eight major languages in the country (a major language is defined as having at least one million speakers) were used in Grades 1 and 2, before shifting to English in Grade 3. However, the policy could not be fully implemented due to a lack of resources (Aguilar, 1961; Gonzalez, 2003). Between 1998 and 2001, a pilot program in 5 public schools in Lubuagan District, Kalinga Province, used Lubuagan as the first language of instruction until Grade 3, while Filipino and Tagalog were taught as subjects. Conceptualized with support from the Summer Institute of Linguistics (SIL International), the results were overwhelmingly positive, indicating a much higher rate of class participation and improved scores in reading and comprehension tests (Dumatog & Dekker, 2003; Gonzalez, 2003). Unfortunately, when the administration changed, policy orientation towards the use of the mother-tongue in the education system was neglected and the practice of MLE was aborted (Gonzalez, 2003, p. 4). Moreover, despite the BEP, code-switching (shifting to the vernacular if the need arises) is a common practice in schools. However, the dominance of the discourse on Filipino vs English marginalized the ideas of MLE and, in the process, excluded other vernaculars in the discourse on language in education.

The major premise behind MLE is that children learn best through their first language. Through MLE, the DepEd supports the "Every Child-A-Reader and A-Writer by Grade 1" vision of the past Aquino government (Symaco, 2017). The DepEd argues that the MLE will support every Filipino child in gaining the foundation not only for literacy and numeracy, but for learning

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[30] The Alternative Learning System (ALS) offers a pathway for those who do not have access to the formal educational system.

Filipino and English as well (DepEd, 2012). It also promotes and preserves the indigenous culture, since teaching is anchored in and uses cultural knowledge, practices, and beliefs and it involves community members as resource speakers for learners and teachers (Dumatog & Dekker, 2003, pp. 2-3). The MLE is also one of the salient features of the comprehensive K-12 education reform implemented by the Aquino administration beginning in the 2012/2013 school year. To date, 19 languages have been introduced. Development of teaching and learning materials for 20 other languages is currently on-going as part of the DepEd's goal to cover all languages by 2027 (DepEd, 2020). As in BEP, the institutionalization of MLE was a result of discursive maneuverings to overcome the divided and often tense political discussions of language issues. This policy shift – from BEP to MLE – was achieved by shifting the discourse on the educational benefits of MLE, while decentering the hegemony status of Tagalog (Tupas & Martin, 2016, p. 7). It thus avoided the tricky question of which language is suitable and appropriate as a MOI in the education system and it, albeit subliminally, inserted indigenous languages into the project of nation-building. However, there have been challenges in the implementation. As in the past, there is still lack of resources, as well as an insufficient number of teachers who have enough mastery of the various languages to be able to teach them (Tupas & Martin, 2016). In Maguindanao, Southern Philippines, for instance, 70% of the teaching staff in the school system are not from the province and thus do not speak the local native language. As a result, the dominant language has become the Tagalog-based Filipino, while the native Maguindanaoan has the status of a second language. In addition, linguistic borrowing from Tagalog is widespread not only in household conversations, but also in politics, thus there is a preference for Tagalog over Maguindanaoan (Maulana, 2014). Some people are concerned that languages spoken by minorities will be subsumed into the regional language. There are teachers who adopt practices that do not comply with the rationales of MLE as an act of silent defiance and non-identification with the policy. Still, there are educators who note that unless the use of indigenous languages brings (economic) opportunities, MLE will remain ineffective (Williams, Metila, Pradilla & Digo, 2014, pp. 3-4).

Despite the inclusive and emancipatory intentions of MLE, there is strong resistance and opposition to it, particularly from policymakers. For instance, in 2008, three congressional bills pushing for English as the MOI were submitted to Congress. From July 2013 to July 2016, several proposals to reinstate and strengthen the use of English as the MOI were again submitted to Congress (Abulencia, 2018, p. 44). Proponents of these bills mainly argue that mastery and fluency in English would increase Filipino graduates' global competitiveness. This argument mirrors the basis of Executive Order (EO) 210 in 2003 (Llanto, 2008). In 2015, antagonists of the K-12 reform submitted a petition to the Supreme Court (SC) to stop or suspend the reform, citing that in matters of MLE, mother-tongue based instruction is inferior,

wasteful, inefficient, redundant, and counter-productive to children's development. Hence, it violates the Constitution's aims of providing quality education. In 2019, 10 years after the institutionalization of MLE, a prominent language scholar proposed using Filipino to teach mathematics and sciences, calling attention to the provisions of the 1987 Constitution (Cabreza, 2019). Cebu's incumbent governor is determined to bring back English as MOI in all public schools in the province starting in the 2020 school year, pointing to students' low scores in the 2018 Programme for International Student Assessment (PISA) as proof that MLE has failed; a move that found support from the Provincial School Board (Israel, 2019).[31] For the same reason, the DepEd again took up the debates on MLE, suggesting that it will look into the matter of which language is better suited as MOI (English or students' native languages), although the current Commissioner also stressed other factors, such as poverty, as a cause for the poor PISA outcomes (Arcilla, 2019).

### 5.6.2.4. The CHEd and Tanggol Wika (Language Defenders)

The K-12 reform in basic education impacts higher education in two ways. First, it requires the higher education curriculum to be adjusted to ensure that knowledge and competencies are deepened. Second, as two additional years are added to the basic education level, higher education institutions nationwide will have lower enrolment during the five-year transition period from 2016 to 2021. In line with the curriculum change, the CHEd issued Memorandum Order 20 (2013), which reduced the General Education, or GE, units to a minimum of 36 units in higher education curricula. The distribution of the units is as follows: 24 units of core courses (8 core courses / 3 units each), 9 units of elective courses, and 3 units on the life and works of Jose P. Rizal (as mandated by law). Filipino Language (as taught courses), Panitikang Filipino (Philippine Literature), and Philippine Government and Constitution, which were included in the previous curriculum, have been removed from the revised curriculum. The CHEd argued that with the K-12 reform, these Filipino subjects and other language subjects would be intensified at the basic education level, thus, there is no need to repeat them at the tertiary level.[32] Courses in English, the humanities, mathematics, natural sciences, and social sciences will also be affected, as are discipline-based introductory courses, such as general psychology or basic economics. In addition, HEIs have the prerogative to teach the general education courses in English or Filipino or to integrate these two languages into the core and elective

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[31] Cebuanos's refusal to comply with the MLE has its roots in the strife that resulted from the institutionalization of Tagalog as the national language in 1937. Cebuanos apparently took offence in the matter because at that time, it was the most widely spoken language in the country (Baumgartner, 1989). In 1988, the first Aquino government signed Executive Order No. 335 (EO 335) which required the use of Filipino in official communications of all government agencies and institutions. In retaliation, the Cebu Provincial Board and Cebu City Council banned Filipino as the MOI in school and as a medium of official communication in the whole province. This act was followed by a petition of 97 Congress officials from other provinces to withdraw or suspend EO 335.
[32] The course, Philippine Government and Constitution, was also removed from the curriculum at the junior and senior high school levels.

courses. The CHEd calls the new approach to GEC a paradigm shift because it now focuses on higher levels of thinking, civic competency, and practical skills using an interdisciplinary approach in relation to oneself and the international community. It shifts away from the remedial nature of discipline-based subjects, such as languages, and helps students develop their global competitiveness by focusing on research, comprehension, and writing competencies, albeit most likely in English (CHEd, 2013, pp. 3-6). However, the CHEd's decision prompted resistance from several institutions and individuals who argued that the policy is 'un-Filipino' because it removed Filipino as a taught subject at the tertiary level, particularly Filipino I (Communication Academic Filipino), Filipino II (Reading and Writing for Research), and Filipino III (Artistic Expression). These critics claimed that the CHEd's new approach is unconstitutional since it has relegated the status of the Filipino language below English; it is "an imminent cultural genocide, the impending murder of our national language and local literature" (Navallo, 2019, para. 4; Eder, 2018). There are also concerns that many universities will prefer to teach the GEC in English, thus leaving no room for Filipino to be taught as a subject in part because most subjects at the tertiary level were already taught in English in the old curriculum.

On April 15, 2015, *Tanggol Wika*, or the *Alyansa ng Mga Tagapagtanggol ng Wikang Filipino* (Alliance of Defenders of the Filipino Language), submitted a petition together with the group, Suspend K-12 Alliance, asking the Supreme Court to review the CHEd's MO 20 and issue a temporary restraining order to stop the CHEd from implementing it. This petition is the first ever document written in Filipino (Tagalog) submitted to the Supreme Court. The group claimed that CMO 20 has seriously violated the provisions in the 1987 Constitution which mandate the use of Filipino as MOI to develop a sense of nationalism and national identity amongst students. As discussed in the previous section, the claims of the petitioners reflect the idea that one national language is necessary to achieve national unity and development, an idea that has left the Filipino society in search of *the* national language. The Alliance claimed that removing Filipino subjects also disregards Republic Act 7104 (Commission on the Filipino Language Act), Republic Act 232 (Education Act of 1982) as well as Republic Act 7356 (Law Creating the National Commission for Culture and the Arts). It further stated that the CHEd has failed to include colleges and universities in its public consultation prior to the release of CMO 20, hence it gravely abused its discretionary power. In addition, leaving the decision to HEIs to teach the subjects in English or Filipino, the Alliance argued, is already a lost battle because HEIs (as well as the business sector and the elites) have always preferred the use of English as MOI (Tanggol Wika, 2019). In 2018, the Supreme Court en banc finally upheld the constitutionality of CMO 20 and the validity of the CHEd's authority to revise the curriculum, stating that the revisions do not violate the Constitution or any existing law. Tanggol Wika responded with a motion for reconsideration. However, in a further resolution in March 2019, the Supreme Court

decisively resolved to deny the request. As of June 2019, the organization has submitted a letter of protest decrying the Supreme Court's decision as "patently unjust," citing that CMO 20 "retains and prioritizes English Language while killing Filipino and Panitikan in College" (Tanggol Wika, 2019, p. 3). Various groups have also voiced their protests against the SC ruling through social media channels and other outlets to gain political support for reinstating Filipino at the tertiary level. A group of nationalist lawmakers have submitted House Bill 223 in Congress urging the CHEd to scrap its CMO 20, while an online petition at www.change.org urging to legislate the same House Bill has gathered 3,498 signatures as of August 2020. Several government officials have also criticized the decision, fearing that the grasp of the Filipino language by the youth will deteriorate, and that the country "will lose its soul" (Villegas, 2018). The Commission on the Filipino Language (KWF), on the other hand, has expressed concerns that more than 10 public and private colleges and universities have dismantled their Filipino Departments presumably as a response to the SC ruling and CHEd Memorandum Order 20, thus "killing the language" (Macairan, 2019).

Yet, despite the institutionalization of Filipino as the national language, English has, in fact, always enjoyed a special status as the national 'working' language. It has established itself as the norm and standard by which access to opportunities is judged and measured, such as university admission in elite universities or key positions in big companies. The ability to speak 'good English' has come to signify quality education, 'good breeding,' and employability locally and abroad (Eder, 2018). Although Filipino could be used in teaching at the tertiary level, in practice, the preference to teach in English is widespread and highly encouraged through policies (see above, EO 210 from, 2003). According to Eder (2018), the discourse on Filipino vs English in the general education curriculum needs to be understood from two standpoints. One is from the perspective of Filipino professors whose tenure security could be threatened either by the lag of enrolment during the K to 12 transition phase, the dissolution of the Filipino Departments, or by the use of English as the MOI. The other is based on the significance or relevance of the Filipino as a national language, its utility in nation-building, and its intellectual development. These two standpoints constitute and intersect in the idea of status. Although the fears of Filipino professors are expressed through tenure security, a closer inspection reveals that many of them dread being "downgraded" to teaching in junior or senior high schools, thus losing the social status accorded to college and university teaching staff. Similarly, many nationalists are concerned that the struggles to establish Filipino as the national language would be in vain, as it will become a second choice. As previously mentioned, English is used in formal and official contexts, while Filipino remains primarily within the informal realm. Thus, there is a real bias towards English. The debate is not about the status of English in the curriculum, but the status of Filipino as an alternative to English.

According to its opponents, CMO 20 reduces the value of Filipino as a language and as an academic discipline, and thus also the value of professors teaching Filipino (Eder, 2018). What is more, these debates have once again overshadowed the relevance of other major languages in developing nationalism and nation-building. These debates that pervaded the public discussions in the last 7 years demonstrate how the idea of 'one language, one nation' is steeply anchored in academia. They also marginalized other discourses that criticize the hegemony of Tagalog-based Filipino and its imposition on other local languages. Nevertheless, the constitutional stipulations and education policies in the country firmly established English as a means of communication, not only in the spheres of business and education, but also in all the major channels of mass communication. English became the controlling language, the language of power and prestige. It became instrumental in positioning the Philippines and the Filipinos within global politics, particularly in creating the labor-export driven policies which began in the 1970s under the Marcos dictatorship and which continue to this day. The status of English continues to polarize the country. On the one hand, it perpetuates the colonial image of the Filipino as being subservient to the US culture. On the other hand, the ability to communicate in English is highly regarded as an indispensable skill for Filipinos in a globalized world (Bernardo, 2004; Symaco, 2017). The Filipino vs native language vs English debate is thus far from over. The struggle continues.

### 5.6.3. Defining national security

National interest and national security are two overlapping sub-strands in the discourse strand on nation. A full discussion of these two policy areas are beyond the scope of this research, hence only an overview of the prescient points can be presented here. This strand is important, because it informs the reading and interpretation of the CHEd's internationalization approach. The country's national security priorities are laid out in the National Security Policy (NSP) (National Security Council [NSC], 2018). Its formulation is a task that rests with the President and is executed in collaboration with the National Security Council under the Office of the President. To date, only two NSPs are publicly accessible: NSP 2011-2016 from the second Aquino administration and NSP 2017-2022 from the Duterte government. For the first time, a National Security Strategy (NSS) was also published in 2018, which operationalizes the NSP 2017-2022 (NSC, 2017). The NSS integrates the security policies, goals, and courses of action into a blueprint to fulfill the national security vision. It also articulates the national interests and national values and conveys the State's purposes to gather public support for its programs (NSC, 2018, p. iv). National security is defined as the "the state or condition wherein the nation's sovereignty and territorial integrity; the people's well-being, core values, and way of life; and the State and its institutions; are protected and enhanced" (p. v). It rests on three pillars: national unity, political sovereignty and territorial integrity, and freedom from all forms

of threats (man-made or natural). In this context, national unity is understood in terms of sharing "one national identity, that is, "being Filipinos regardless of their political, ethnic, linguistic, religious, cultural and ideological orientation" (p. 14). As discussed earlier in this chapter, this conceptualization rests upon a belief that 'one identity, one nation' is necessary to build the nation. The definition provided in the NSS follows Kofi Annan's concept of security, one that centers on the people (instead of military) and encompasses "human rights, good governance, access to education and health care and ensuring that each individual has opportunities and choices to fulfil his or her potential" (Annan, K., 2000, para. 4). From this view, national security means freedom from poverty and fear. Annan's insertion of the human and humane aspects into the concept of security synthesizes different elements of development goals under the umbrella of national security. The Philippine government has thus expressed the interdependent relationship between (economic and social) prosperity and security, citing that one cannot be achieved without the other (NSC, 2018). What needs to be considered though, are the practical implications of re-framing and embedding development goals into national security concerns, particularly in an unstable political climate such as the Philippines. Consequently, the fundamental elements of human security enumerated by Annan in his speech are reflected in the definition of national security provided by the NSC, as well as in the administration's national security vision for 2022, which emphasizes security as a public good (NSC, 2018, p. 20). Further integrated in this vision are the country's national development goals articulated in the Philippine Development Plan (PDP). The National Security Policy is summarized in a 12-point Agenda with corresponding strategies divided into action areas which provide the basis and orientation for courses of actions at the agency and institutional levels.

- Guarantee public safety and achieve good governance (human and political security).
- Mitigate the impact of health-related threats (health security).
- Develop a dynamic, inclusive, and sustainable economy (economic and financial security).
- Achieve food and water security (food security).
- Safeguard and preserve national sovereignty and territorial integrity (military and border security).
- Heighten consciousness and pride in Filipino heritage, culture, and values (socio-cultural security).
- Promote human and ecological security (environment and disaster security).
- Achieve energy security.
- Ensure maritime and airspace security (maritime security).

- Strengthen international relations (international security).
- Provide strong cyber infrastructure and cyber security (informational and cyber security).
- Improve vital transportation infrastructure and port security (transportation and port security) (NSC, 2018, p. 22; NSC, 2017, pp. 24-25).

Across these areas, human capital development through education is conceived to be one of the main strategies in achieving national security. This does not only allude to employment and creation of economic opportunities through innovation, but also includes developing a "patriotic mindset" and a concern for national issues amongst the citizens (NSC, 2018, p. 31).

### 5.6.3.1. National interests

Philippine governments – from the first administration after independence to the current administration – have always expressed concerns for national interests, albeit in varying clarity and levels of explicitness. Important reference documents are the four constitutions, foreign policies, and development plans that lay out the strategies being pursued, although effective implementation can only be determined by operational outcomes visible 'on the ground.' According to Romero, Jr. (2017), previous administrations have not clearly defined statements as national interests. What their messages do reflect are the existing social, political, and economic realities that provide the contextual clues to what were perceived as essential. Essentially, the key word in understanding the national interests is inclusivity: "'inclusive security' where all lives matter, inclusive development where all dreams are reachable, and 'inclusive governance' where all voices count" (Romero, Jr., 2017, p. 14). For this reason, national interest means making security, development, and governance available and accessible to the masses – "the poor, the vulnerable, the disadvantaged, the marginalized, and the voiceless" – not only to the elites (Romero, Jr., 2017, p. 15). As Romero, Jr. (2017) argues, these national interests have been framed and re-framed by the different administrations. Depending on the country's leadership and existing conditions, emphases have shifted. In 2018, the Duterte administration defined how it understood national interests and the conditions that it considers "to be desirable or essential to the unity, survival and well-being of the country and its people" and as "absolutely necessary for the very survival of the nation" (NSC, 2018, p. 17). These core interests form the basis of the framework for national security priorities and strategies:

- Protection of the freedom, public safety, and welfare of the people.
- Ending all internal armed conflicts, i.e., communist insurgency, violent extremism, and terrorism.

- Preservation of the sovereignty and integrity of the national territory.
- Pursuit of independent foreign policy in the exercise of national sovereignty and self-determination.
- Pursuit and sustainment of inclusive economic growth and development.
- Protection of the Filipino public from criminality, illegal drugs, pandemics, cyber-attack, and weapons of mass destruction.
- Freedom from any forms of nuclear weapons within the Philippine territory.
- Protection and preservation of ecological balance.
- Promotion of social cohesion and national unity.

Still, the current Duterte administration re-framed many aspects of national interests, specifically in reference to its controversial 'War on Drugs' and Anti-Terrorism Law signed in 2020 which embodies the 'War on Terrorism.' Both programs have raised criticisms about human rights violations. As of August 10, 2020, 27 petitions which challenge the constitutionality of the Anti-Terrorism Bill have been submitted to the Supreme Court. Although there is a real threat to national security from insurgents aligned to the Islamic State jihadist group, human rights activists, lawmakers, and concerned citizens fear that the law is a cloak to authorize suppression of legitimate forms of dissent and criticisms of government (Aspinwall, 2020, paras. 4-6; Buan, 2020). Indifference to international laws, instilling fear through threats such as the Anti-Terror Law and the proposed reinstatement of capital punishment, the continued downplaying of Chinese intrusion into Philippine maritime territory, the ineffective handling of COVID-19 and the aggressive campaign for federalism amid the pandemic, the combination of these concerns has sparked public outrage and protests against the country's leadership. More importantly, these issues illustrate how the administration is re-framing national interests and security issues, and how it radically departs from previous national standpoints. According to the CHEd, the national interests in internationalizing the higher education sector are the following:

- building human capital and innovation capacity towards achieving the country's economic and social development goals and the development of the Filipino nation as a responsible member of the international community
- advancing learning and integrity of research, protecting academic freedom, promoting continuing intellectual growth, and developing responsible and effective leadership
- promoting more equitable access to quality higher education
- safeguarding the interests and reputation of the Philippine higher educational system including its students, academic staff, institutions, and programs; and

- ensuring the political, economic, social, and other strategic aspects of national security are well-protected at all times. (CMO 55, 2016, p. 5)

Owing to the shifting priorities in terms of national interests and the fact that CMO 55 was published two years ahead of the current administration's statements, it is challenging to map-out the CHEd's priorities vis-à-vis the government's.

### 5.6.3.2. Foreign policy

The country's approach to foreign policy is anchored and framed in the 1987 Constitution, specifically in Article II:

> The Philippines renounces war as an instrument of national policy, adopts the generally accepted principles of international law as part of the law of the land and adheres to the policy of peace, equality, justice (1987 Phil. Const. art. II § 2).

> The State shall pursue an independent foreign policy. In its relations with other states the paramount consideration shall be national sovereignty, territorial integrity, national interest, and the right to self-determination (1987 Phil. Const. art. II § 7).

In addition, the functions and operations of the Department of Foreign Affairs (DFA) are stipulated in Republic Act No. 7157, also known as the Philippine Foreign Service Act of 1991. According to DFA, the country's foreign policy has three pillars (DFA, n.d.):

- Preservation and enhancement of national security
- Promotion and attainment of economic security
- Protection of the rights and promotion of the welfare and interest of Filipinos overseas.

The stipulation on an independent foreign policy is a matter of interpretation. In the NSS, the government emphasizes a 'strong' independent foreign policy (NSC, 2018, p. 55). Nevertheless, serving the national interests – as defined by political leaders – remains the top priority of the country's foreign policy. In his analyses of Philippine foreign policy, Cruz De Castro (2010; 2016) argues that the country's strategy shifts between balancing and equi-balancing approaches, depending on the administration's leadership. On the one hand, a balancing approach is characterized by a country's allegiance with the status quo or major power (such as the USA). On the other hand, equi-balancing involves a country pursuing a mixture of activities and linkages with two competing major powers (such as the USA and

China) to elevate its policy influence and "ensure itself from undue external influence" (Cruz De Castro, 2010, p. 358). Both strategies are employed by small states, such as the Philippines and other Southeast Asian countries, to advance their political interests. While former President Aquino pursued a balancing strategy by maintaining closer allegiance to the US and keeping China at bay, the current president, Duterte, has on several occasions stressed the country's need for independence from the US and has instead sought to strengthen diplomatic and economic ties with China since coming to power in 2016. At the same time, he is fostering a strategic partnership with Japan, to equi-balance China's power in the region. In relation to education, the direction of the country's foreign policy has serious impacts on internationalization policies, particularly on the priorities given to programs and the allocation of resources.

### 5.6.4. Discourse topoi

This section presents the various arguments or topoi the CHED uses in its discourse that focus on the nation. This discourse strand is not only the most prominent found in the data, but it is also the most fragmented, initially indicating 13 overlapping sub-strands occurring in different spheres. To cope with this complexity, it was necessary to untangle the knots by re-reading the text segments several times, then combining the sub-strands based on the underlying topoi or argumentation schemes. The discourse strand on nation can be found in all of the CHEd's policy documents, regardless of topic. For one, it is typical of the genre of policy documents in the Philippines. Secondly, it indicates the CHEd's source of authority to create and promulgate policies within its scope of responsibility. More importantly, it signifies the CHEd's purpose vis-à-vis the nation that goes beyond its function as a government agency. Higher education, as in many countries across the globe (see Chapter 2), is attributed a crucial role in attaining development in all its facets. Thus, supporting national development is the CHEd's foremost responsibility towards the public and the nation (assuming that there is, indeed, a Philippine nation). Three topoi mark the discourse strand on nation. The Topos of Necessity provides the foundation for two other topoi: the Topos of Commitment which signals the state's commitment to internationalization, and the Topos of Threat which appeals to the need to mitigate the threats of internationalization.

### 5.6.4.1.    Topos of Necessity

The Topos of Necessity borrows from the argumentation scheme based on practical reasoning. Practical reasoning is a form of reasoning which expresses an entity's (or an agent's) course of action or means taken to achieve a certain goal. It appears closely similar to causal argumentation schemes. However, in practical reasoning, the assumption is that a rational entity or agent has a goal and the capability to carry out actions to achieve the goal, based on

its knowledge of given circumstances (Walton et al., 2008, p. 94). Practical reasoning is an agent's linking of practical inferences. A practical inference has two types of premises: Goal Premise (GP) and Means Premise (MP). Walton et al. (2008, p. 95) suggests the following notation:

Goal Premise:     Bringing about $S_n$ is my goal.

Means Premise:    In order to bring about $S_n$, I need to bring about $S_j$.

Conclusion:       Therefore, I need to bring about $S_j$.

$S_n$ stands for a state of affairs. It is a statement that describes an event or occurrence (either a human action or a natural event) that can be brought about by the agent or entity. $S_j$ stands for a course of action. The "need to" or the "practical ought" conveys the commitment of the entity to both premises (Walton et al., 2008, p. 95). In the context of the Philippines, this can be translated as follows:

Goals Premise:    Bringing about national security is the goal of the nation.

Means Premise:    In order to bring about national security, the nation must bring about $S_j$ (or a course of action).

Conclusion:       Therefore, the nation needs to bring about $S_j$.

In this schema, it is assumed that the nation is a rational agent or entity that is capable of carrying-out a particular action. However, as discussed earlier, the concept of a Philippine nation is, at the very least, contested. To move ahead for the purpose of the research at hand, in this section, I assume the existence of a Philippine nation, that the Philippine government represents the goals of the nation, and that the nation sanctions the Philippine government to pursue a course of action in the nation's interest. The series of actions indicated in the conclusion refer to the various interventions that the government has defined to achieve national security, one of which is to internationalize its higher education system. These conditions can be expressed as follows:

Goals Premise:    Bringing about national security is the goal of the Philippine government.

Means Premise:    In order to bring about national security, the Philippine government must internationalize its higher education system (among other possible courses of action).

Conclusion:       Therefore, the Philippine government needs to internationalize its higher education system.

There are two variations of this argumentation scheme. One is based on the necessary-condition schema, while the other is based on the sufficient-condition schema. The practical reasoning of the necessary-condition schema indicates the chain of reasoning from an initial state to a final state when the goal is defined (Walton et al., 2008, p. 95). This is the basis for the Topos of Necessity.

Goal Premise: The goal of the Philippine government is to bring about national security.

Alternative Premise: The Philippine government considers on the given information that bringing about at least one of [$B_0$, $B_1$,… $B_n$, including internationalization of higher education system] is necessary to bring about national security.

Selection Premise: The Philippine government selected internationalization of higher education system as an acceptable, or the most acceptable, necessary condition for national security.

Practicality Premise: Nothing unchangeable prevents the Philippine government from bringing about internationalization as far as it knows.

Side-effects Premise: Bringing about national security is more acceptable to the Philippine government than not bringing about internationalization.

Conclusion: Therefore, it is required that the Philippine government brings about internationalization of its higher education system.

Another similar, more concise schema that appears appropriate to the Topos of Necessity is the argument of 'goal' (Walton et al., 2008, p. 325). It can be expressed through the following conditionals.

A1: Internationalization of higher education (among other interventions) contributes to national security. (Also called a major premise.)

A2: The Philippine government aims to advance national security. (Also called a minor premise.)

CR: If the Philippine government aims to advance national security, it should internationalize its higher education (along with other interventions).

C: Therefore, the Philippine government should internationalize its higher education.

In the discourse strand on nation, the Topos of Necessity is characterized by different goals, such as national development, national goals, national interests, human resource

development, and so on. The goal components are articulated in various ways, so much so that one must closely examine the text fragments to recognize the intentions in the text. The basic definition of national security discussed in section 5.6.3 is therefore instructive in reading and interpreting the policy texts. Having said this, the Topos of Necessity is evident in all of the CHEd's policy documents, but most prominently in CMO 55 (2016), the core policy document on internationalization; in CMO 46 (2012), which enumerates the guidelines for the quality assurance system, as well as in R.A. 11448, which regulates TNE programs and services, and in Executive Order No. 285, which regulates the admission of international foreign students. The location of this topos clearly illustrates the link between the overall national goal and the purpose of internationalization of higher education policies. National security goes hand in hand with the phenomena of globalization and modernization, and the need for socio-economic growth through human resource development. For instance, in explaining the goals of the CHEd's internationalization policy, Section 6 of CMO 55, Article IV, states:

> The higher education internationalization strategy shall be directed towards supporting the national development goals, reflected in the Philippine Development Plan (PDP) and the CHED's medium-term Strategic Plan. In the medium-term, higher education quality improvements resulting from internationalization would be manifested through an increasing number of graduates who possess employable skills both in the domestic and international labor markets, global perspectives, and adaptable mindsets (p. 6).

The use of 'shall' as an auxiliary verb in the second phrase intensifies the declaration of the CMO's goal. The PDP mentioned above refers to the 2011-2016 development plans committed to by the second Aquino government. Consequently, the current government under president Duterte has drafted its own development plans. The PDP can be described as a roadmap for the government. It is a five-year plan that details the administration's programs and projects towards security, development, and governance priorities (Romero, Jr., 2017, p. 16). According to the National Economic and Development Authority (NEDA, 2017), the PDP 2017-2022 is the first medium-term plan that is anchored on the 10-point Socio-Economic Agenda and articulates the long-term *AmBisyon Natin 2040* (Our Dream 2040). In a nutshell, the vision is to achieve prosperity by eradicating poverty and to become a middle-class society wherein the citizens are healthy and well-educated and communities thrive in diversity and are resilient (NEDA, 2017). The vision also considers the various international commitments signed by the government, particularly the United Nations Sustainable Development Goals 2030. The government identified investment in human capital as one of the foundations to achieve *AmBisyon 2040*. In this context, internationalization of higher education is perceived as instrumental in developing competitive human resources, and thus in sustaining economic

growth. In CMO 55 (2016), the CHEd reiterates the necessity of developing human capital. That is, the CHEd will:

> [….] guide the Philippine higher education sector's internationalization efforts bearing in mind Philippine national interest, security and identity while also contributing to the improvement of the country's competitiveness [….] (CMO 55, 2016, p. 2).

This short statement illustrates a knot within the discourse itself: the nation is tightly linked with the discourses on national development, national interest, national security, and national identity. It also expresses a major statement about the CHEd's policy orientation. It is evident that internationalization policy is orientated towards national security issues. How this falls into place will be clear in the following discussions on other topoi. The goal of improving competitiveness is also evident in the discourse strands on marketization and on quality and quality assurance (see Sections 5.3 and 5.4 respectively). Arguments using the Topos of Necessity can also be found in the sections on scholarships, mobilities, and partnerships in the same CMO 55 (2016):

> Publicly funded activities for outbound students shall prioritize diploma courses in the *high-need disciplines* at the graduate or postgraduate levels for beneficiaries who can potentially bring higher returns to teaching or research upon their return. Scholarships, which cannot be provided adequately by local HEIs will be supported in *fields and disciplines needed for economic development*, or where there are opportunities elsewhere to significantly advance knowledge in these fields and disciplines (p. 14; my emphasis).

> In line with the Philippines' aspiration *to become a competitive and knowledge-based economy*, HEIs shall be encouraged to focus on faculty mobility programs that are linked to research and creative work, particularly in *priority development sectors* (p. 15; my emphasis).

In these text segments, there is a clear instruction to allocate resources to fields that are considered vital to economic development. The CHEd does not identify these fields in any of the CMOs on internationalization. However, based on the policy document for granting the state-wide government scholarships, the 'high-need' disciplines are those that are deemed to be aligned with global innovation, such as science, technology, engineering, agri-fisheries, and mathematics (STEAM); and priorities of the government in key growth areas, such as semiconductors and electronics, business process outsourcing, tourism, general

infrastructure, and priority manufacturing industries (CHEd, 2019). In respect to Transnational Education (TNE), the policy rationales are stated in Article VI:

[….] with programs and institutional providers moving across borders with increasing ease, a *pressing need* has occurred for national systems to define the rules and standards that could provide the basis for quality assurance and recognition of foreign qualifications. This will ensure that outcomes and impacts of transnational education (TNE) are relevant to national needs and priorities (CMO 62, 2016, p. 16; my emphasis).

Recognizing the challenges brought resulting from the rapid rise of TNE and its impact on higher education, the Government shall take measures to effectively manage transnational arrangements so that these can complement the goals of the national higher education system [….] (CMO 62, 2016, p. 16).

In determining TNE partnerships that may be permitted by CHED, the partnership must clearly show that it can contribute to the building of research universities, spurring innovation and fostering the creation of a knowledge economy for the country (CMO 62, 2016, p. 16).

These stipulations underline the necessity for controlling and regulating internationalization activities to ensure that they are aligned with national interests and priorities. They also underline the function of the CHEd as the overseer and the gatekeeper of TNE activities. As posited, the CHEd's strategies and policies are always anchored to the government's development plan and, by extension, in human capital development. For instance, the CHEd articulated the same goal in one of its earliest policies on internationalization. Article 1 of CMO 01 issued in 2000 on policies and guidelines in the implementation of international linkages and twinning programs:

It is the policy of the Commission on Higher Education (CHED) to internationalize higher education in the country in order to facilitate the development of human resource base that will be responsive to the demands of the 21st century (CMO 01, 2000, p. 1).

[….] The CHED encourages participation of recognized higher education institutions in international networks and consortium as this is *crucial* to the understanding of global issues, the development of highly skilled human resource and the overall institutional growth (CMO 01, 2000, p. 5; my emphasis).

Both phrases clearly state that the goal of internationalization is to develop the country's human resources. This is apparently the country's response to the challenges of globalization. The same goal underpins the CHEd's policy on transnational education covered under CMO 02 from 2008:

> Transnational education is *a matter of critical public interest* in terms of relevance of content to *national needs* and the need to safeguard the interests of legitimate education providers and the general public (p. 1; my emphasis).

In the above statements, the use of the adjectives 'crucial' and 'critical' are part of the CHEd's discursive strategies to intensify the tone of the message and stress the importance of the relevant policies. This sense of criticality and urgency is more pronounced in CMO 46 (2012) which provides the guidelines for the quality assurance system. In this policy document, the CHEd specifically calls attention to higher education's mandate to contribute to growth and development. This is clearly articulated in the policy rationale:

> Philippine higher education is *mandated to contribute to building a quality nation* capable of transcending the social, political, economic, cultural and ethical issues that constrain the country's human development, productivity and global competitiveness (p. 1; my emphases).

Although the term 'quality nation' leaves plenty of room for interpretation, the preceding phrase does seem to indicate a unified nation (see Section 5.6.2). Consequently, the Philippine higher education system is not only tasked with developing the country's human potential, but is also expected to be instrumental in unifying its citizens to become a nation. This has consequences for the mission of the higher education system and the CHEd's function.

Another example can be found in Article I, Section 5 of CMO 22 published in 2016, which provides the guidelines for administering foreign scholarships for graduate studies during the K-12 transition period. In this document, the CHEd states that:

> [....] the Commission thus deems it critical to make available a select range of opportunities for graduate studies abroad, reiterating the Commission's position that *our nation cannot compete with its neighboring countries that are now moving towards offering cutting-edge programs and technologies unless we invest in creating a pool of experts in our academic institutions* (italics in original) (p. 2).

This statement is one of the principles for issuing the scholarship guidelines. It emphasizes the severity of the country's condition in respect to innovative education programs due to underinvestment and lack of experts in academe. Thus, the scholarship is a necessary measure to enable Philippine higher education to compete regionally.

Several press releases also indicate the Topos of Necessity and underline the goals of national development. During the signing of the academic cooperation with Canada, the following quote from the former CHEd Chairperson appears in a press release:

> In today's global village, establishing linkages with key partners around the world is necessary for higher education institutions to be truly globally competitive," stressed Chairperson Licuanan. She urged Philippine HEIs "to explore more opportunities for greater cooperation and collaboration in order to better prepare our students and faculty to face the challenges of the 21st century (CHEd PR, 2015b, para. 1).

In signing the partnership for research and development via a turnover ceremony of the Memorandum of Agreement and the Research Funding Agreements between the CHEd and the University of California-Berkeley, the CHEd described the goals of the partnership as follows:

> […] to enhance the research capacity of Filipino faculty-student researchers and address national development priorities (CHEd PR, 2015a, para. 2).

In a press release on the key role played by the British Council in internationalization of the Philippine higher education, the CHEd stated that:

> Expanding collaboration between universities in the Philippines and United Kingdom is a key strategy for the internationalization of higher education and competitiveness (CHEd PR, 2019a, para. 1).

In another press release promoting the Newton-Agham scholarship program for doctoral studies in the UK offered together with the British Council, the CHEd described the goal of the partnership as follows:

> The partnership also paves the way for the joint development of niche programs between Philippine and UK HEIs to co-develop niche programs that remain unavailable

in the Philippines, despite being identified as critical in supporting national development, among them: transportation studies, design engineering, tropical medicine and public health, energy security studies (CHEd PR, 2016b, para. 4).

In 2017, during the Asia-Pacific Economic Cooperation (APEC) meeting hosted by the CHEd and the Department of Science and Technology (DOST), DOST Secretary Mario G. Montejo noted that:

> Our commitment to higher education stems from the constant need to develop skilled, highly-trained knowledge workers with graduate degrees, conducting research and development activities in the science and technology fields. Thus, our chances for boosting the country's S&T base shall ultimately rest on the quality of our students and workforce (CHEd PR, 2017j, para 4).

These press releases convey the necessity of entering into partnerships with select countries to develop the capacity of the institutions and individuals chosen to participate in the activities. In addition, they communicate the need to build the country's research capabilities in niche fields or fields that focus on science and technology. Interestingly, these partnerships involve institutions from developed countries which are also major players in the international higher education scene. Thus, the underlying argument, the Topos of Necessity, legitimizes the Philippines' position on the receiving end of these academic and research partnerships.

### 5.6.4.2.    Topos of Commitment

The Topos of Commitment in the discourse strand on nation is highly visible in the CHEd's press releases. Based on the argument from commitment, it is expressed below (Walton et al., 2008, p. 335):

A:    A has committed itself to propositions Y.

CR:    If A has committed itself to propositions Y, then A must perform actions that show its commitment to propositions Y (evidence of commitment).

C:    Thus, A needs to fulfill its commitment to propositions Y.

In other words:

A1:    The CHEd is committed to internationalization of higher education

A2:    Linkages and partnerships are one of the fundamental pillars of the CHEd's internationalization strategy.

CR:     If the CHEd is committed to internationalization and linkages and partnerships are part of the strategy, then the CHEd needs to show its commitment by establishing linkages and partnerships for internationalization.

C:      Thus, the CHEd needs to take action to fulfill its commitments to internationalization.

On the one hand, the Topos of Commitment is different from the Topos of Law, Topos of Regulation, or Topos of Responsibility because it indicates fulfillment of a commitment to a particular proposition or a firm decision to support something (though not necessarily legally binding). It has performative aspects conveyed to the public or the target audience. In the context of this study, on the other hand, it is used together with other topoi, such as the Topos of Advantage or the Topos of Law, to substantiate the CHEd's logic of operations. Hence, in this case it is inseparable from the Topos of Consequence and topos of rules. The following samples illustrate the aspect of performativity and linkage with other topoi.

During the CHEd's campaign to promote and train higher education institutions on its internationalization policies, Atty. Macabangun-Milla, the CHEd's incumbent Director of International Affairs Staff underscored the statements below.

> Anchored on the mission to provide Philippine higher education institutions with assistance and directions in the development of institutional internationalization strategies and implementation planning […] the Commission on Higher Education International Affairs Staff (CHED IAS) conducts nationwide internationalization mentoring (CHEd PR, 2019a, para. 1).

> Against the backdrop of internationalization and globalization, the Commission created a policy framework that provides for overarching policies relevant to the internationalization—both home-based and cross-border—of Philippine higher education, guided by principles on foreign policy enshrined in the 1987 Philippine Constitution that upholds the promotion of national interest and non-diminution of the national sovereignty (CHEd PR, 2019a, para. 2).

These statements are supported by several topoi, such as Topos of Responsibility (mission), Topos of "Reality" (globalization), Topos of Law (foreign policy), and Topos of Necessity (national interests and national sovereignty). However, the core message of the text fragments is the CHEd's commitment to its mission to assist and direct higher education institutions in their internationalization endeavors. In addition, the promotion of national interests and non-diminution of national sovereignty is a crucial aspect in interpreting the CHEd's commitment.

In this connection, the country's long colonial history is relevant for understanding the emphasis placed on upholding sovereignty and pursuing national interests; the 'holy grail' so to speak of the country's foreign policy etched in all versions of the Constitution. By the same token, the three pillars of the foreign policy (preservation of national security, promotion of economic security, and protection of Overseas Filipino Workers or OFWs; see Section 5.6.3.2) also play out in the CHEd's commitments and in its internationalization policy. One example of such a commitment is illustrated in the CHEd's press statement on the issue of credential equivalence of Filipino engineers and architects in Qatar in 2016.

> During the meeting with Qatari officials, the Philippine delegation reiterated a previous invitation from the CHED for a Qatari delegation composed of the Ministry of Education, the SEC, and the UPDA to visit the Philippines at the soonest convenient time in order for them to better understand and appreciate the Philippine education system and institutions, particularly those offering programs in Engineering and Architecture (CHEd PR, 2016a, para. 6).

> The visit of the delegation from Qatar to the Philippines will be scheduled in a few months, possibly at the start of the next Philippine School Year when the work on Qatar outcomes is expected to be completed. A Memorandum of Agreement in Education between Qatar and the Philippines is being discussed (CHEd PR, 2016a, para. 7).

The physical visit, the discussions with, and invitation extended to the Qatari officials are part of the performativity of the Topos of Commitment. The message being conveyed is the CHEd's commitment to diplomacy in solving the problem of equivalence of credentials and the CHEd's affirmation to protect OFWs.

By entering into a partnership with the Canadian Bureau of International Education (CBIE), one of the leading non-profit organizations dedicated to international education globally, the CHEd is showing its commitment to building Philippine HEIs' institutional capacity in the field. Thus, the CHEd's commitment stems from the belief that the partnership will be useful in advancing the internationalization activities of the sector.

> To promote greater capacity building and education and research collaboration, the Commission on Higher Education (CHED) and the Canadian Bureau of International Education (CBIE), with support from the Canadian Embassy, formalized their partnership today for the implementation of various education programs in Canada (CHEd PR, 2017e, para. 1).

We remain committed to forging new partnerships with the goal of granting scholarships and capacity-building opportunities to our college faculty and staff. We look forward to strengthening their academic qualifications and enhancing their teaching through mobility and training programs in collaboration with Canadian universities," CHED Chairperson Patricia B. Licuanan said (PR, 2017e, para. 3).

In signing the academic cooperation with the Ministry of Education of Lao, the CHEd is fulfilling its commitment to fostering stronger links and academic exchanges with ASEAN countries. In addition, the signing of the memorandum of understanding coincided with the Philippine chairmanship of ASEAN. Thus, the partnership also signals the positioning of the country as a leader in the region.

"I am delighted that, after four years, we were finally able to sign the MOU," CHED Chairperson Licuanan said. "This is the first time for the Philippines and Lao PDR to have an agreement on higher education. This MOU will foster stronger ties and friendly relations between our two countries and will hopefully go a long way towards achieving greater mobility and more interaction between and among our higher education institutions" (CHEd PR, 2017g, para. 9).

The MOU with Lao PDR is in line with CHED's strategic plan to strengthen international academic cooperation and linkages of local higher education institutions with their counterparts in other countries as well as with international organizations (CHEd PR, 2017g, para. 6).

Another example of the CHEd's commitment to establishing linkages to expand its research portfolio is evident in the statement made during the APEC meeting in 2017. The arguments that further underpin the action below are the Topos of Necessity (it is necessary for economic development) and the Topos of Advantage (it is useful for the nation).

Our commitment to higher education stems from the constant need to develop skilled, highly-trained knowledge workers with graduate degrees, conducting research and development activities in the science and technology fields. Thus, our chances for boosting the country's S&T base shall ultimately rest on the quality of our students and workforce (CHEd PR, 2017j, para. 4).

The cooperation agreement with New Zealand signals a different commitment, namely, to establish equivalency and recognition of credentials between New Zealand and the Philippines.

> "As more and more Filipinos want to live, study and work in New Zealand, it would be mutually beneficial for both countries to have an education cooperation agreement that provides a framework of transparency, accountability, respect and protection of our citizens towards access to education pathways, clearer comparability of qualifications and robust mobility of students and professionals," explains CHED Chairperson Licuanan (CHEd PR, 2017k, para. 4).

This particular partnership is interesting on two accounts. First, the number of Filipinos migrating to New Zealand, either for work or for study, has been increasing in the past years. The Filipino community ('Kiwinoy') is the third largest and fastest growing Asian community in New Zealand (Lipura, 2019). Second, the Philippines is New Zealand's largest source of international students from ASEAN (CHEd PR, 2017k, para. 5). Thus, it can be construed that the CHEd's commitment to collaborate with the government of New Zealand is underpinned by two other topoi: the Topos of Advantage (it opens opportunities for employment and studies) and the Topos of Necessity (to ensure equal treatment of Filipinos in the host country).

Another partnership, signed with the Center for Global Advancement of Community Colleges in the USA, indicates the CHEd's commitment to pursue internationalization of local universities and colleges (LUCs) in the country.

> Washington DC- The Commission on Higher Education (CHED) continuously pushes for the internationalization of Philippine higher education institutions (HEIs) with the signing of a Memorandum of Understanding (MoU) with the Center for Global Advancement of Community Colleges (CGACC) to foster greater education cooperation and exchange between HEIs in the Philippines and United States of America (USA) (CHEd PR, 2019d, para. 3).

The incumbent CHEd Commissioner De Vera further noted in his speech, that the partnership with CGACC is essential to open up mobility opportunities and promote innovative internationalization practices for Philippine state universities and colleges (SUCs) and local universities and colleges (LUCs). This is an important and interesting signal to LUCs, whose relationship with the CHEd is defined by ambivalence over the CHEd's ambit and scope of authority. It also implies that LUCs are comparable to community colleges in terms of

institutional typology. The succeeding text fragments from press releases mark a 'historical moment' in terms of the impact of the administration's foreign policy orientation to the CHEd's activities. The first one concerns the foreign ties with Russia.

> After more than a decade of negotiations, cooperation in higher education between the Philippines and Russian has been reached with the signing of a Memorandum of Understanding (MOU) on Higher Education between the Commission on Higher Education (CHED) of the Philippines and the Ministry of Education of the Russian Federation on the sidelines of the 31st ASEAN Summit at the Philippine International Convention Center, Pasay City (CHEd PR, 2017l, para. 1).

The MOU is only one of the several bilateral agreements signed by the Duterte government with the Russian government. The linkage with Turkey is a nod towards higher education institutions in Southern Philippines, which also signals a shift in the relationship between the capital Manila (National Capital Region) and Muslim-dominated Mindanao.

> The Philippines' Commission on Higher Education (CHED) and Turkey's Council of Higher Education (YÖK) on Wednesday, November 21 formally signed the Protocol for Cooperation in the Field of Higher Education, which aims to strengthen the academic cooperation between the two countries for the next three years (CHEd PR, 2018e, p. 1).

> Dr. De Vera also lauded the on-going academic partnership between the Mindanao State University (MSU) and Kastamonu University. "I hope Turkey and its higher education sector will continue to strengthen its partnership not just with MSU but with other universities in the Philippines, especially those located in Mindanao" (CHEd PR, 2018e, p. 5).

On the national level, the partnerships with Russia and Turkey indicate transformations in Philippine's international relations (see also Pitlo III, 2019). The CHEd's actions illustrated above do not only demonstrate its commitment to internationalization, particularly in expanding and diversifying partnerships and programs, but they also show how the commitments are underpinned by other arguments and beliefs or shifts in policy direction at the executive level.

### 5.6.4.3.    Topos of Threat

This topos is adapted from the topos of danger or threat suggested by Reisigl and Wodak (2001, p. 77), as well as from Walton (2013, pp. 102-103). However, the latter authors differentiate between the appeal to fear and appeal to danger, arguing that danger is an objective reality independent of the agent or entity, while fear is an emotional reaction to a situation. Nevertheless, Walton (2013., p. 102) states that the Topos of Threat (as well as the fear and danger appeals) can be considered as a special type of argument from negative consequences, based on the claims of suffering serious harm. The Topos of Threat is based on the following conditionals:

A:     A policy bears dangerous or threatening consequences
CR:    If a policy bears specific dangers or threats, one should do something to mitigate them.
C:     Thus, the danger or threat should be mitigated.

In the context of the nation, threat is most visible in the policy guidelines involving international students and foreign higher education providers (FHEP). This is an interesting aspect of the discussion that has implications for engagement with international students and entities at the policy and operational levels. Notwithstanding, the Topos of Threat is also implicit in text fragments that point out the necessity to uphold the country's national security and non-diminution of its sovereignty. It cautions against threat to independence and sovereignty through influence by other countries, foreign institutions, and other foreign entities. It can be articulated as follows:

A1:    Internationalization bears threatening consequences
CR:    If internationalization bears specific threats, one should do something to mitigate them.
C:     Thus, the threats should be mitigated.

In the Topos of Threat, threat is any circumstance that could endanger national security on various levels, from individual infraction of certain laws (i.e. immigration), to threat of competition, to intrusion of foreign cultural values, to imposition of foreign entities. The Topos of Threat is multi-layered and is not often readily discernable. It does not only imply a threat to national security, but also protection from such threat. Hence, the Topos of Threat is tightly linked with the Topos of Necessity (to control the threat and protect the nation). For example, it is stipulated in the general principles and strategies of the internationalization policy, that:

> While cross-border education shall be promoted as an important component of internationalization, the national higher education system shall continue to be entrusted

with the *preservation and promotion of cultural and social norms and values enshrined in the Constitution* (CMO 55, 2016, p. 5; my emphasis).

The noun *preservation* implies the need to preserve, to uphold, or to protect, while the noun promotion can be interpreted as to encourage, to advance, or to develop. The term enshrine has a double meaning: to preserve and to sanctify. These words imply the need to preserve Filipino cultural and social norms and values and encourage their practice and upkeep, as they are 'sanctified' in the Constitution. In relation to the the CHEd's internationalization policies and the Topos of Threat, the above phrase can be interpreted as the necessity to safeguard Filipino cultural and social norms and values from foreign intrusion or influence. The Philippine Constitution as the source of knowledge on Filipino norms and values is problematic, because general and normative values such as human rights and individual freedom permeate the Constitution. It is only in Article XIV (on Education, Science and Technology, Arts, Culture, and Sport), Section 3, that the Constitution specifically refers to values that need to be preserved and promoted through education. These are patriotism, nationalism, respect for human rights, citizenship, ethical and spiritual values, moral values, discipline, critical and creative thinking, and academic and vocational development (1987 Phil. Const. art XIV § 3). Notwithstanding, these are also expressed in general terms or are undefined in the Constitution and are thus open to the government's interpretation. Citing old and current state policies, the incumbent government, for example, summarizes the 'core' Filipino national values as follows: *maka-Diyos* (God-fearing), *makatao* (humane), *makabayan* (patriotic), and *makakalikasan* (pro-environment) (Office of the President, 2018, p. 16). These national values are laid-out in the Philippine National Security Strategy (2018) thus they are integral elements of national interests that must be protected. In other words, although internationalization is necessary to develop the higher education sector, the CHEd and higher education institutions must ensure that the Filipino norms and values defined in the Constitution, and by extension in the National Security Strategy, will prevail. From this purview, certain aspects of internationalization are threatened by or in danger from local and international HEIs that do not honor the Filipino norms and values. In CMO 02, signed in 2008 and which regulates Transnational Education in the country, it is stipulated that:

> There must be no instance, except when all education services are delivered purely via Internet or postal/courier, where a FHEP may be allowed to operate or establish local presence without a partner (p. 12).

FHEP stands for Foreign Higher Education Provider. In this registration guideline, the CHEd is mitigating the threat of competition. The partnership is thus necessary to protect the interest of

the Philippine higher education sector. This is anchored in Article XIV, Section 4.2. of the 1987 Constitution which protects Filipinos' interests by establishing that the control and administration of educational institutions must be put in the hands of Philippine citizens. This is reiterated in CMO 55 (2016) in Article VI, Section 14 which provides the policy, rationale, and principles on programmatic and institutional mobility, specifically transnational education.

> The foreign HEI seeking to form a branch campus must meet all the following conditions:
> a) established for foreign temporary students;
> b) establishment must be advantageous to the Philippine higher education system;
> c) there must be an invitation from the CHED and the Philippine Government;
> d) the foreign HEI must have international prominence and [be] accredited by its appropriate government agency or accrediting body to offer international programs or operate offshore programs;
> e) the Branch Campus must have program offerings different from local offerings by Philippine HEIs; and
> f) capital accumulation and reinvestment within the Philippines must be undertaken (p. 17).

Basically, the above are the criteria for eligibility in establishing a foreign branch campus in the Philippines. The threat to competition is here extended to competition for students and educational programs. In terms of establishing academic cooperation agreements, Article VII, Section 16 of CMO 55 specifies that:

> Academic cooperation agreements must be based on the principles of mutuality, transparency, reciprocity and respect for national sovereignty and autonomy of the HEIs that are parties to the agreement. It must offer the prospect of a long-term relationship between the partners in order to be sustainable (p. 19).

The threat that needs to be mitigated in the above statement is the threat to the autonomy of local higher education institutions. In this sense, parameters of the partnership are that it is required to establish mechanisms to ensure equality between the local and foreign institutions. Similarly, in the guidelines for determining with whom a local HEI can partner, consideration should include the following aspects (among others):

> e) Recognition of, and respect for, national differences, and efforts to deepen understanding of these differences;

f) Willingness to make collaborative decisions and share responsibility for them;

g) Transparency on all issues of decision-making and resource allocation [....] (p. 20).

Executive Order (EO) No. 285 signed in 2000 amended CMO 53 from 1997 and regulates the entry and stay of aliens (note the use of aliens in the policy parlance) pursuing higher education studies in the Philippines. To improve the implementation of EO 285, the CHEd, as the lead agency of the Inter-Agency Committeeon on Foreign Students (IACFS), issued the Joint Memorandum 01 (2017). In EO 285, the government has stipulated the need to monitor international students' activities.

> The NICA and the NBI shall check, whenever necessary, the activities of foreign students brought to their attention which appear to be inimical to the security of the State. Criminal complaints filed against foreign students shall be referred to the NBI for investigation and appropriate action. These agencies shall undertake steps necessary to safeguard the due process of valid application, visa issuance and entry authorization of foreign students in the country (2000, p. 6).

> The BI shall investigate, apprehend and prosecute, if necessary, foreign students who are not complying with Philippine immigration laws and regulations. Violation of immigration laws and regulations shall be a ground for the cancellation of a student visa and deportation of the student concerned (2000, p. 6).

Consequently, the need to monitor and report the activities of foreign students is reiterated in the Joint Memorandum 01 (CHEd, 2017). NICA stands for National Intelligence Coordinating Agency, the government agency responsible for coordinating all national intelligence activities in the country. NBI is abbreviation for the National Bureau of Investigation, the government agency that handles high-profile cases which are considered 'of national interest.' BI or the Bureau of Immigration ensures that foreigners (or aliens in its policy parlance) comply with existing immigration laws. The CHEd's policy guidelines on inbound mobility are grounded in EO 285. Thus, in CMO 55, the intake of international students is regulated as follows:

> In implementing the policy framework, the CHED shall accord high importance to the selection of bona-fide international students with high academic potentials and seriousness of purpose that can contribute to the enhancement of the academic environment in Philippine HEIs. At the same time, the CHED shall ensure that the quality of education providers for international students remains high, and that the students are assured of the education services for which they have paid (2016, p. 11).

This stipulates that the identity and purpose of the international student need to be established, as well as the identity and legitimacy of the education provider. This regulation mitigates two possible threats: the threat of illegal or illegitimate student (external), and the threat of illegal or illegitimate education provider which could damage the country's reputation (external and internal).

The semantics provide a clue for interpreting the policy. One is the term 'bona-fide' (or bona fide), which means lawful, legitimate, or genuine. Another one is the use of the term 'alien' by government agencies and state policies to refer to incoming or inbound international students, although the CHEd mainly uses the term foreign. Usage of these words have operational implications not only in terms of admission to respective HEIs, but also regarding the granting of visas and regulation of the stay of international students. Another aspect that needs to be underlined is the source EO 285 (2000). Important contextual clues to EO 285 can be found in three older state policies, namely: Executive Order No. (EO) 104 issued in 1967 which announced "the procedure for the control of alien student in the Philippines;" Executive Order (EO) No. 721 issued in 1981 which created the Bureau of Youth Affairs, Foreign Students and Foreign Schools in the Ministry of Education;[33] and Executive Order (EO) No. 188 issued in 1994 which superseded and simplified the procedures promulgated in Executive Order (EO) No. 104, and which also established the Inter-Agency Committee on Foreign Students.

EO 104, for instance, created the basic framework for organizing the admission, entry, and stay of foreign students "in the interest of national security" (1967, p. 203). It also established the roles and responsibilities of the Department of Foreign Affairs, Department of Education (replaced by the CHEd in 1994), Bureau of Immigration, National Bureau of Investigation, and National Intelligence Coordinating Agency. These organizations form the core of the current Inter-Agency Committee on Foreign Students (IACFS) (CHEd, 2017). The need to control, monitor, and report on the academic and social activities of foreign students stems from EO 104. This role is not specific to an agency, however, one of the duties of the Bureau of Investigation is that it: "on a selective basis should check whenever necessary the activities of foreign students brought to its attention, whose activities are inimical to the security of the State" (1967, p. 207). This passage can also be found in EO 285 (2000, p. 6). The following points are articulated as the preamble to EO 721: the country's commitment to admitting international students is part of its foreign policy; the number of foreign students from

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[33] When the Marcos administration ended, the Bureau was dissolved and its functions were redistributed to other agencies. For instance, youth affairs are now handled by the National Youth Commission, while foreign schools in the Philippines are now under the Department of Education. Foreign students are, in general, under the remit of the CHEd as the chair of the Inter-Agency Committee on Foreign Students (IACFS).

democratic and communist countries is increasing; thus "there is a need of closely regulating, supervising, and monitoring the entries of foreign students to this country in the interest of national security"; and therefore "it is necessary to strengthen the collection of information of foreign students" as per the country's national security plan" (1981, paras. 2-5). This sense of distrust has historical roots. January to March 1970 was characterized by student activism in the country, referred to as the First Quarter Storm, while at the same time, the number of Iranian students began to increase. Sevilla, Jr. (2015) cites the 1970s and 80s as the period of second massive migration to the Philippines from West Asia, particularly by Iranian students who studied medicine, dentistry, and engineering at Philippine universities. The Iranian Revolution of 1979 elicited a series of political protests by anti-Shah and pro-Islamic Iranians in Manila and led to the investigation of Iranian students and the eventual deportation of 30 of them (Sevilla, Jr., 2015, p. 105). I contend that these events had a significant influence in how foreign students in general are perceived in the Philippines. Although EO 721 was superseded by EO 285 (the current policy), the preamble from EO 721 was rephrased to adapt to the existing political views. For example, the statement of admitting foreign students as part of the foreign policy has been replaced by an economic impetus. The need to closely monitor and control foreign students has been diluted to "openness and vigilance in determining bona-fide foreign students" and to improving the procedures "without compromising national security" (2000, paras. 1-6). Nevertheless, protecting the national security and national interests are still the priority. The need to establish the legitimacy of HEIs is reiterated in the next regulation.

> To establish and maintain the Philippines' reputation as a provider of high quality education, and to safeguard the interests of international students, the CHED shall develop and implement a code of conduct that sets out standards of conduct of registered education providers as well as the role and administrative responsibilities of concerned government implementing agencies and instrumentalities (CMO 55, 2016, p. 13).

The envisioned code of conduct and hierarchy of responsibilities between agencies are presented here as important instruments for mitigating the threat of illegitimate or unqualified institutions. This is an internal threat that the CHEd must mitigate. The next passages refer to international students.

> The seat allocation for international students per program/discipline shall be based on the carrying capacity of the pertinent college/faculty provided that this shall not exceed 1/3 of the total student population of the HEI (CMO 55, 2016, p. 12).

International students shall not be allowed to take on paid work while pursuing their academic programs, except those classified as internships required by their program (CMO 55, 2016, p. 13).

These phrases are instructive, as they indicate a perception that international students are a threat to local Filipino students. The threats signified here are: first, competition for study places, and second, competition on the labor market. Therefore, these threats to the interest of Filipino students must be reduced by controlling access to university programs and the labor market. The 1987 Constitution does not only guarantee to make education accessible to all Philippine citizens, it also regulates the number of foreign students in any school or higher education institution. Art. XIV, § 4.2. states that "no group of aliens shall comprise more than one-third of the enrollment in any school" unless the school has been established for foreign diplomats (1987 Phil. Const. art. XIV § 4.2.). There is thus a real concern that local students will have to compete with the foreign students. Again, this fear has historical origins. Since the majority of Filipinos did not have access to higher education during the colonial occupation, there is a perceived need to protect and prioritize Filipinos.

### 5.6.5. Summary

The discourse on nation is inextricable from the other three discourse strands: marketization, quality, and ASEAN. Indeed, it is the core of the entire discourse on higher education and on internationalization, from where the other discourse strands emanate. It is also the most complex in terms of argumentation scheme since multiple topoi usually occur in one text fragment. Interpretation of the policies proved challenging as well because it required deconstructing the multiple layers of the discourse rooted in national policies. The concept of nation is another stumbling block, particularly its applicability to the Philippine context. The discourse strand on nation is underpinned by three lines of argumentation schemes or topoi. The Topos of Necessity builds the base of the arguments. In other words, the pursuit of ensuring national security goals has the highest priority in internationalization and in higher education in general. This is the basis for the CHEd's logic of operations. On the one hand, the Topos of Commitment illustrates the various initiatives the CHEd undertakes to show its engagement. It is characterized by performativity, such as in ceremonial performance of signing bilateral agreements. On the other hand, the Topos of Threat marks the mitigation of possible external and internal threats to the national security. It necessitates establishing mechanisms to protect national interests. With this, the discussion comes full circle.

Figure 13: Topoi embedded in the discourse on Nation
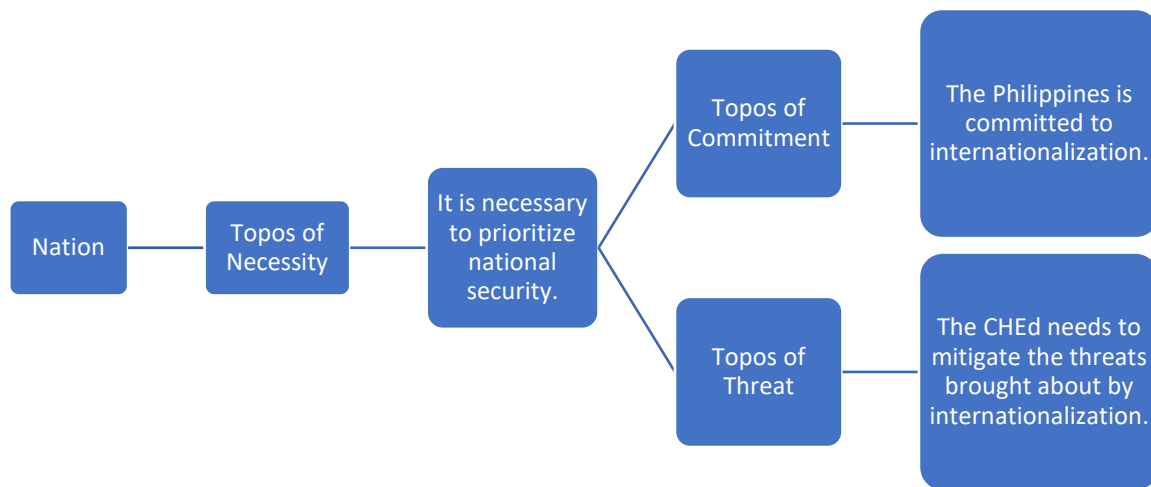


## 5.7.  Implications of the discourse

In this section, I focus on addressing the third research question: how do the discursive strands impact the discursive practices in internationalization of higher education in the Philippines? I will relate my discussions to the conceptual frameworks discussed in Chapters Two and Three and situate the local Philippine articulations within the current global discourse.

### 5.7.1.  Discourse superstructures

De Wit (2019) cites two major elements that impact the field of internationalization of higher education. One is the massification of higher education or the expansion of higher education systems at a global scale. The second is the extent of the global knowledge economy which places a premium on high-level technology and science in economic relations (pp. 10-11). These elements have shifted higher education systems' core missions to supporting a states' imperatives to develop global competitiveness and economic growth. This neoliberal juggernaut penetrated the field of education long ago. Although it has been disseminated, reinterpreted, recontextualized, and rearticulated across national contexts, the economic rationales remain embedded in the mainstream discourse both in theory and practice (Davies & Bansel, 2007; Doherty, 2015; Haapakoski & Pashby, 2017). In this respect, the Philippines is no exception.

To borrow from Rizvi and Lingard (2010), there are two socially constructed "discursive superstructures" present in the data set studied in this research. One is the concept of globalization as an ideology. This is reified in the policy documents through the topos of "reality." The main argument is that globalization and its corroborating neoliberal logic are the

country's unavoidable "reality" that requires specific policy action. All four discourse strands discussed in this chapter are encapsulated within this neoliberal trope. Within this 'discursive superstructure,' globalization is construed as a problem-space (Collier & Ong, 2005) that presents challenges, risks, threats, and opportunities that needs to be resolved or managed by the state and its institutions. It legitimizes the mobilization of state power through policies that direct the Philippine higher education institutions on how to engage in internationalization, both at strategical and operational levels, so as to not compromise national security and, at the same time, to reap the benefits it 'confers' not only on individuals and institutions, but on the nation as well. On the one hand, this is most evident in the discourse strands on quality and on nation, where notions of control and regulation are concealed in the Topos of Responsibility and the Topos of Necessity. On the other hand, the Topos of Advantage / Usefulness invoked in all four discourse strands assumes a causal relationship between education (training, schooling), labor productivity (employability, flexibility, increased income) and economic growth (Tan, 2014). The phrases competitive human resource capital, employable skills, and adaptable mindsets succinctly summarize this idea. But this is not new. Previous attempts at education reforms and rationales for assessment and evaluation of the Philippine education system had been mainly driven by the same neoliberal logic reified in the policy documents on internationalization of the higher education sector (see Magno, 2010). Hence, the Philippine internationalization strategy for higher education implies complicity with the mainstream neoliberal discourse that limits the policy imaginary (Doherty, 2015, p. 395). The premise is that the internationalization of higher education contributes to economic development, but the risks and threats must be mitigated.

The second "discursive superstructure" is the discourse on national security, based on an imagined 'one Filipino nation' and supported by the Topos of Necessity or the need to defend such a nation from all forms of threat – including the threats and risks that globalization brings. This 'discursive superstructure' is noticeable in the frequent references to geopolitical boundaries in the policy documents, such as the 'nation,' 'national,' or 'national development' and the 'foreign,' 'alien,' 'international,' 'regional,' or 'global.' The ubiquitous use of the term 'national interest' in the data implies that the policy framework should be understood in the context of foreign policy and international relations, or in relation to the state's external environment. It is a powerful terminology that invokes an image of a sovereign nation-state defending itself in the international field. Thus, I would argue that the 'discursive superstructure' on national security is a form of resistance to the hegemonic neoliberal discourse that questions the power and authority of nation-states. In other words, it serves to assert the Philippine state's political authority over its jurisdiction. I locate the discourse strand on nation at the heart of the national discourse on education, and the discourse strands on marketization,

quality, and ASEAN are ingrained within it. Thus, they are tightly woven into the pursuit of national security. Closely linked to the nation is also the premise that internationalization of higher education brings about positive societal outcomes. This is evident in the phrases that indicate deepening social and cultural relations, achieving national cohesiveness, and improving the social landscape. However cogent this claim may sound, internationalization per se cannot guarantee positive societal changes. Positive societal changes are dependent on many factors from within and outside the higher education system. For one, internationalization policy must be designed in such a way that it is inclusive, ethical, and democratic, and so that it will open up opportunities for all institutions and participants. Having said this, I also argue that the "discursive superstructure" on nation is a paradox, in that it constructs internationalization of higher education as both a threat to national security and beneficial and useful to national development. I also argue that these two 'superstructures' need to be understood as dynamic forces that produce tensions not only in the policy process, but also in the outcomes and outputs.

The unique Philippine approach articulates internationalization of higher education in a way that it accommodates the global discourse, while at the same time attending to the country's unique contexts. On the one hand, this contextualization addresses specific concerns that are rooted in the nation's colonial history, such as protection of the state's sovereignty. On the other hand, it illustrates how the Philippine state, through its policies, negotiates its own position within the global community as it aspires for equal footing in international competition and collaboration in higher education. These discourse strands have implications for how the various stakeholders of the Philippine higher education sector engage with the phenomenon. However, these implications are as sinuous as the discourse strands, which are very broad in their own right. To focus the discussions in this section, I will address two main concerns that have direct implications on the understanding of the policies and to the practice of internationalization of higher education in the Philippines.

### 5.7.2. QA regime

According to Doherty (2015), "neoliberalism as metapolicy reconstructs the 'problem' of education and other public services as a crisis of quality and efficiency, and its 'solution' in market mechanisms of individualized choice" (p. 395). This is observable in the Philippine context too. To borrow from Collier and Ong (2005), the Philippine government constructs quality education as a problem-space in its internationalization of higher education policies. It conveys an image of a permanent crisis that needs to be managed. This is illustrated in the Topos of Burden that argues for a policy orientated towards regulation and control. However, I recognize that the discourse strand on quality is a double-edged sword and that one cannot discuss one side without mentioning the other. The problem of quality in the Philippine higher

education sector, indeed in the Philippine education system in general, is undeniable. The high number and uncontrolled increase of HEIs, insufficient funding of public HEIs, lack of infrastructure, and the high unemployment rate mentioned (see Section 5.4.3) are just but few examples of the material consequences of the quality issues. Indeed, this is a situation that requires state intervention through the CHEd. However, the quality assurance system that the CHEd has implemented raises critical questions, particularly when one recognizes that quality assurance is a political process that, when linked with rewards and punishments, mobilizes "new regimes of power" (Morley, 2003).

### 5.7.2.1.        Problem of definition

Different stakeholders pursue different purposes. This is a basic condition that makes the understanding of quality challenging. Keeping in mind that the concept of quality assurance originated in the context of the mass production of consumer products, Harvey and Green (1993) explain the assumption underlying the mission-led definition of fitness-for-purpose which is the notion that 'if you get it right you will delight the customer or sponsor" (p. 19). But this raises further questions such as the extent to which the institutional mission represents quality for its stakeholders; whether students and parents have a voice in setting the institutional vision and missionl whether they are represented when institutions define what brings them 'satisfaction' as 'customers and consumers of education' (cf. Keränen, 2014); if satisfaction is understood as achieving one's goals; and who and what mediates satisfaction. In addition, as Welch (2011) argues, poor institutions are for poor students. Plainly stated, students and parents buy what they can afford, thus there is a trade-off between quality and affordability. In this respect, financial capacity is a major mediator of satisfaction as well as access to quality education. What is more, as indicated in CMO 46 (2012), students hardly play a role in determining quality. Even the support provided to students as a core indicator of quality is assessed based on the operational effectiveness of the process (indicators such as output), and not from direct feedback from the students (pp. 22-23). If quality is based on an individual HEI's type, then defining qualitative quality outcomes in higher education becomes relative. Although it creates an inclusive and democratic system where institutions can aspire for quality based on their own typology, it also generates problems of comparability across the higher education sector. The main issue with using the second definition of quality as conformance to standards, is the assumption that criteria or standards are objective and that conformance will result in quality, or that there is a direct causal relationship between conformance to standards and quality. In regard to international standards, quality as conformance to standards construes quality improvements as an increase in the 'creation' or 'production' of a workforce that is readily deployable in the global market with credentials that are equally recognized and acceptable globally. This assumption is inherently problematic. Not only are the international

standards subject to continuous negotiation as circumstances change, they also privilege western knowledge and values and presuppose an equal treatment in a global space. As Rizvi (2014, p. 144), Eder (2016), and Shahjahana and Morgan (2016) argue, the global space is marked by inequalities and power contests. The third definition of quality that focuses on institutional transformation highly depends on higher education institutions' processes, mechanisms, and resources. It is not only a question of how institutional transformation can be measured qualitatively, but also a question of the CHEd's role in this matter. The following section will clarify this issue.

### 5.7.2.2.        Control and regulation

According to Morley (2003), quality assurance is an expression of the power to control. The typology-based quality assurance system implemented by the CHEd through CMO 46 (2012) has been criticized for undermining higher education institutions' autonomy and academic freedom (Tabora, 2016; Aquino, 2018). In regard to the internationalization of higher education, I argue that by linking the CHEd's development support provided to HEIs' levels of accreditation, quality assurance not only creates a hierarchy within the higher education sector, but also serves to maintain the status quo. Here, I specifically refer to the CHEd's level of support to help higher education institutions engage in internationalization. This table is found in CMO 55 (2016, p. 8).

It is also necessary to keep in mind that the country has one national university, the University of the Philippines. As of July 2018, there are 111 state universities and colleges (SUCs) and 108 local universities and colleges (LUCs). These public institutions are autonomous by legislation. There are 1,673 private higher education institutions, whereby only 62 are autonomous and 9 have deregulated status.

There are several problems with the distribution of incentives as detailed in CMO 55. For one, the tier system categorizes higher education institutions as either belonging to tier 1 (the highest), 2, 3, or 4 (the lowest). The categorization is based on the following criteria: status (autonomous, deregulated, or regulated), level of program accreditation, international presence and network, extent of internationalization activities, infrastructure and strategic plan for internationalization, and a well-defined typology based on the CHEd's quality assurance system. Tier 1 is reserved for the University of the Philippines as the national university, and select SUCs and autonomous HEIs by evaluation. One question is whether the status of being a national university count as a qualification in its own right. If it does, then it seems to be a case of entitlement or preferential treatment based exclusively on status. Or is the national university – like all other universities – expected to comply to the requirements specified under

tier 1? Other issues raised relate to the selection process of the select SUCs. Furthermore, LUCs are not mentioned in the table, although they are also autonomous by legislation. The question here is whether LUCs are not officially covered by the Memorandum after all, despite the fact that there is no provision that exempts LUCs from the QA standards set by the CHEd. These leaves the status of the LUCs in an ambiguous place. The implication is that they either can only participate in limited internationalization activities or they have the freedom to take part in the internationalization process as they see fit regardless of the tier system. Also unclear from this reading is whether LUCs are excluded from the assistance provided by the CHEd in tiers 1 and 2, even though they meet the set criteria. Interestingly, the CHEd does not include LUCs on its list of HEIs on its website. These questions allude to the strained relationship between the LUCs and the CHEd. Although the CHEd has entered into partnerships with community colleges in North America to support LUCs in their internationalization efforts, a power contest between LUCs and the CHEd is visible. On the one hand, LUCs are not included in the CHEd's list of recognized HEIs nor in the CHEd's tiered support system for internationalization. On the hand, a majority of LUCs perceive the CHEd's QA system as irrelevant to them as autonomous HEIs created by their local governments.

The higher the tier, the more institutional capacity that is required from HEIs and the more comprehensive the assistance and incentives provided by the CHEd. This highlights the question of fairness and justice in distributing opportunities to HEIs, specifically because the distribution norm is based on power (prestige and status) and equality (rewards based on inputs), not on the specific needs, exigencies, demands, or commitments to support HEIs in developing their institutional capacity for internationalization. Thus, a closer examination of the support provided by the CHEd reveals how its support is converted into incentives for adapting the CHEd's QA system. These incentives are in the form of increased opportunities for tier 1 institutions, particularly in regard to enhancing their prestige and status, their institutional capacity, as well as their economic opportunities through cross-border and transnational education. This system secures and sustains the advantageous position of tier 1 HEIs. These HEIs thus serve as flagship HEIs, or poster HEIs, for the Philippine higher education sector. On the other hand, HEIs in tiers 2, 3 and 4 are pigeonholed in terms of their capabilities which delimits their potential engagement with the internationalization process. In fact, the tier system prevents the organic development of HEIs in the lower categories with regards to their internationalization activities because the support or incentive they receive is confined to what they are already doing. Hence, the system is designed to maintain the status quo. This means that HEIs in the lower tiers are kept in their scope of engagement, unless they move up the ladder of accreditation level and vertical typology. Although HEIs have the prerogative to determine their own rationales and measures for internationalization in accordance with their

horizontal typology (CMO 55, 2016), the CHEd has control and power to determine the capacity of HEIs to implement internationalization programs. These stipulations once again accentuate the need to control quality and to uphold the reputation of the Philippine higher education sector, a message that is implicit in the Topos of Responsibility that justifies the CHEd's regulatory function. Also, internationalization is invoked to justify and legitimize the CHEd's QA system. In other words, conceptualizing quality as a problem-space justifies the CHEd's internationalization policy and strategies as well as its punitive/reward quality assurance system.

### 5.7.3. Mobility

According to Teichler (2015), the physical movement or mobility of international students is one of the most frequently addressed questions in the research and discourse on internationalization of higher education (p. 7). The CHEd defines the mobility of individuals as one of the most integral components of its internationalization policy.

### 5.7.3.1. Outbound mobility and brain drain

The CHEd emphasizes that outbound academic mobility is not to be understood as migration (CMO 55, 2016, p. 14). In addition, publicly-funded scholarships, both for students or faculty members, are tied to return service obligations to deter outbound scholars from seeking employment abroad after graduation (CMO 55, 2016, p. 4). These two provisions preclude the process of transition, or mobile scholars changing their legal status. This runs contrary to, for example, immigration rules that provide opportunities for international students to apply for work permits after the completion of a program, in, for example, Canada, New Zealand, Australia, the UK, or in Europe. The inclusion of these phrases in the policy explicitly points to issues of brain drain and implicitly refers to the oft-debated mobility flow of scholars from 'peripheral' countries to centers of scholarship such as Europe and many English-speaking countries. The policy articulation can also be interpreted as a signpost for the labor migration discourse and brain drain as its corroborating issue. Notwithstanding, there is a real fear of brain drain, not only in the Philippines, but amongst the ASEAN countries as well, which has led to policy measures to 'safeguard' and mitigate the intellectual loss that brain drain represents (British Council, 2018). In the policy documents examined for this study, the topic of brain drain was touched only implicitly by highlighting faculty mobility focused on research in science and technology, creative industries, and teacher training in outcomes-based education (OBE). In other words, the concern about brain drain in the context internationalization of higher education in the Philippines pertains primarily to the loss of faculty experts and less to student graduates, except those under the government scholarship mechanism.

### 5.7.3.2. Inbound mobility, security threat, and exploitation

Under the chairmanship of the CHEd, the IACFS is tasked with regulating and overseeing all matters pertaining to inbound international students. In their Joint Memorandum Order No. 01 (2017), the IACFS consolidated the implementing guidelines pursuant to EO 285. These guidelines describe in detail the processes and regulations for all incoming foreign students. The guidelines cover all issues from application to graduation/exit, including documentation requirements and the responsibilities of each agency in each stage of the process; regulations on changing academic programs or institution; conversion of visa status; and extension of stay. The guidelines also cover the monitoring and reporting systems, specifically in connection to the academic status and activities of the foreign students.

After graduation, foreign students must leave the country. In the case of graduate students, they can be offered teaching and research opportunities during their study, if the CHEd and the respective HEI deem them outstanding in their field (CMO 55, 2016, p. 11).[34] However, measuring the contribution of a foreign student in enhancing the academic environment depends on how she/he is accepted and valued by fellow students and by the academic staff. Although many scholars in the field of international higher education concur that incoming international students can indeed positively contribute to the local communities of the host institution, they also agree that it does not occur automatically. In fact, it requires appreciation, understanding, and integration of different values, both on the side of the international student and the host communities. Likewise, for integration to occur, host communities must have effective support structures or measures in place. It is a complex process that cannot be guaranteed simply by a complicated bureaucracy.

International students are also prohibited from taking up paid employment during their study period unless it is an integral part of the program curriculum. Only outstanding graduate students in STEM (Science, Technology, Engineering, and Mathematics) subjects or in key priority sectors can be offered employment as an incentive with the intended benefit not only for the incoming students but for the country as well. Although the CHEd did not provide further information on the scope or themes of key priority sectors they refer to, one can presume that they relate to the development plans of the National Economic and Development Authority. Outstanding international students employed in the country are expected to contribute to its human capital reservoir and therefore to national economic growth. Notwithstanding, these international graduate students are subject to existing regulations and policies on the employment of foreigners (see next section below). I therefore argue that the state's attitude towards international incoming students is ambivalent, self-serving, and to a certain extent

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[34] There are exemptions to this coverage. See JMO No. 01, 2017, p. 6.

even exploitative. On the one hand, incoming international students are considered as a potential threat to national security and therefore require close monitoring by government agencies. On the other hand, exceptional students are considered as potential contributors to economic growth, and are therefore afforded certain privileges not available to all incoming international students. These dichotomies are noticeable in the discourse strand on nation and in the use of the Topos of Threat, and Topos of Advantage / Usefulness.

### 5.7.3.3. Foreign recruitment and protectionism

Protectionism is underpinned by the Topos of Threat to national security. As far as employment of international incoming faculty members, researchers, and students is concerned, the CHEd supports mobility that is organized as part of academic exchanges and formal agreements (CMO 55, 2016). The recruitment of foreign staff is regulated in the R.A. 11448: foreign academic personnel may constitute 80% of the teaching staff, while administrative members are limited to 40%. Regarding the teaching staff, EO No. 65 (2018) stipulates that: "Foreigners may teach at higher education levels (RA No. 8292), provided the subject being taught is not a professional subject (i.e. included in a government board or bar examination)" (§ 2). This provision effectively excludes 43 professions covered by the Professional Regulation Commission, and the law profession which is regulated by the Supreme Court. In other words, the practice of profession by a foreigner in the Philippines is highly regulated. Specifically, Article XII, Section 14 of the 1987 Philippine Constitution states that "the practice of all professions in the Philippines shall be limited to Filipino citizens, save in cases prescribed by law" (1987 Phil. Const. art. XII § 14). This is reiterated in the Foreign Investments Act of 1991 or R.A. 7042 (amended by R.A. 8179 in 2012, and EO 65 in 2018.) which states that the rights of former natural-born Filipino citizens do not include the practice of profession (§ 9.1). Exemptions to these restrictions are specified in R.A. 8981 (also called PRC Modernization Act of 2000.[35] Based on this act, foreign nationals may practice their profession in the Philippines only if their home country has a Mutual Recognition Agreement (MRA) with the Philippine government or if the Philippines is a signatory to an international agreement. Specifically:

> The requirements for the registration or licensing in said foreign state or country are substantially the same as those required and contemplated by the laws of the Philippines and that the laws of such foreign state or country allow the citizens of the Philippines to practice the profession on the same basis and grant the same privileges

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[35] PRC is mandated by law to determine competency standards for the education and practice of professionals, including the regulation of licensure examinations, and issuance of permits.

as those enjoyed by the subjects or citizens of such foreign state or country (PRC, 2012, p. 1).

Currently, the Philippines has signed MRA's with ASEAN (see Section 3.4.6), and in the fields of architecture and engineering with the Asia-Pacific Economic Cooperation (APEC). Outside of these MRAs, and bilateral agreements, professional practice in the Philippines by a foreigner is highly difficult. Likewise, the Labor Code of the Philippines (Presidential Decree No. 442, 1974, as amended, titl. II art. 40), states that non-resident foreign nationals can be employed in areas where the Labor Market Test proves non-availability of competent, able, and willing Filipino nationals. Foreign nationals can be exempt from the Labor Market Test in industries or occupations where there is a supply shortage as long as it is allowed by existing laws and within the frame of bilateral agreements, such as the MRA's mentioned above. Special Worker Permits (SWP) can be issued for employment activities of less than six months. Moreover, a pending bill in the Senate which aims to amend the current Labor Code suggests that foreign nationals who have been issued employment permits "*shall transfer technology* to Filipino understudies within a prescribed period" (Philippine News Agency, 2019; my emphasis).

These laws are mentioned only in passing in the data as 'applicable laws,' particularly in CMO 55 (2016), CMO 62 (2016), EO 285 (2000), R.A. 11448. Notwithstanding, these prohibitions have a substantial impact on the internationalization strategies of HEIs in the country. For example, building up academic expertise and capacity in an area not considered as a niche program or key sector or enhancing Internationalization-at-Home (IaH) activities through recruitment of foreign academics is extremely difficult under these laws. In addition, the fact that the hiring of foreign personnel is enabled only in the area of TNE privileges HEIs that are permitted to participate in TNE programs. This condition is related to another aspect of this discussion, namely elitism.

### 5.7.3.4. Mobility programs and elitism

In a recent survey of 108 HEIs in the country, the lack of financial resources is cited as the foremost barrier to staff and student mobility (ANTENA, 2019). Despite the small number of survey samples vs. the total number of HEIs in the country, this finding is indicative of the main concern that I am raising with regards to internationalization of higher education in the Philippines. The central issue revolves around who can participate and who and what determines who can participate in mobility programs. These questions are related to the issue of control and regulation previously discussed.

In the policies examined for this study, mobility of individuals excludes operational staff, that is, staff who are neither faculty members, researchers, nor members of the management. This is a departure from the ideas promoted by the European Union in its flagship program ERASMUS+ and in the comprehensive internationalization strategies suggested by Hudzik (2010) and advocated by NAFSA (National Association of Foreign Student Advisers) in North America. This is not to say, however, that staff mobility from the Philippines does not occur. On the contrary, mobility of administrative staff does occur, albeit in very small numbers due to funding constraints (ANTENA, 2019). The fact that this type of mobility is not clearly included in the policy guidelines can be interpreted in the context of resource allocation. The state has to allocate its limited resources based on the mobility's relative importance to the policy goals. In this case, mobility of operational staff is not viewed as critical to developing internationalization of HEIs. Thus, from a policy perspective, the operational staff of HEIs are excluded from its provisions. This could hamper (due to lack of funds) staff development in administration of the internationalization processes. Nevertheless, sufficient funding is required for mobility to transpire. Regarding the student body, since access to higher education correlates with the financial capacity of the students, the question of how those from low economic status can meaningfully participate in academic mobility becomes highly relevant. The CHEd has pointed out that due to the lack of public funding, HEIs are encouraged to promote self-funded mobility (CMO 55, 2016). One possible alternative to academic mobility is online or virtual student mobility which has become a key strategy during the COVID19 pandemic in many countries across the globe.[36] However, the digital gap in the Philippines remains a barrier and further highlights deep-seated inequalities not only in terms of individual economic status, but also in terms of inequalities between urban and rural locations (Eder, 2020). Hence, there is fear amongst HEIs that only a select group of individuals and organizations can participate in internationalization activities (ANTENA, 2019).

Despite the fact that the Philippine state supports academic mobility as an integral mechanism to promote the ASEAN project and the ASEAN higher education area, there is still a lack of a cohesive funding system similar to the ERASMUS+ mobility scheme of the European Union. The extent of public funding for academic mobility also varies from country to country within ASEAN. For example, Malaysia, Indonesia, Thailand, and Vietnam have set-up scholarships for academic mobility, while the Philippines' approach strongly depends on foreign scholarships and is limited to what the CHEd terms as niche and STEAM programs. Thus, there is a problem of scale and scope. Limiting resources to what the state deems national priorities will likely produce an imbalance in knowledge production: STEAM and technical fields

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[36] See for example the changes in the Erasmus Calls due to the Coronavirus pandemic. The new calls highlight the shift to online or distance modes of student mobility (https://ec.europa.eu/programmes/erasmus-plus/resources/coronavirus-impact_en)

will flourish at the expense of humanities and social sciences. This would confirm the global trend that Freeman, Marginson, and Tytler observe as the "Age of STEM" (2015). The CHEd endorses the participation of Philippine higher education institutions in various mobility schemes within ASEAN, such as the ASEAN University Network (AUN), the ASEAN International Mobility for Students (AIMS), and the University Mobility in Asia and the Pacific (UMAP). Active engagement in regional networking activities is one of the CHEd's top priorities and it considers it as a key strategy in forging the bond within ASEAN communities. These arguments appear compelling, but questions again arise about who participates and how is participation determined. Participation in internationalization, especially in networking activities such as in AIMS, AUN, and UMAP does not occur in an egalitarian manner. For example, the ASEAN member countries formed the AUN in 1992 primarily to "[…] hasten the solidarity and development of a regional identity through the promotion of human resource development so as to *further strengthen the existing network of leading universities and institutions of higher learning in the region*" (ASEAN University Network [AUN], n.d.; my emphasis).

As expressed above, membership to the AUN is limited to what are considered as leading higher education institutions in the region. As of 2019, AUN has 30 member-universities from the ASEAN region and several network groups. It also actively engages with universities in China, Japan, and South Korea within the remit of ASEAN+3. In the Philippines, only the top three universities qualify as members of the AUN: Ateneo de Manila, De La Salle University, and the University of the Philippines.

AIMS, on the other hand, is the flagship program of SEAMEO-RIHED. Initially a mobility project between Malaysia, Indonesia, and Thailand in 2009, AIMS has become one of the strategic elements for harmonizing the ASEAN higher education area. AIMS's goal is to "create a vibrant student mobility programme for citizens of all SEAMEO member countries" and "to cultivate globalized human resources" (SEAMEO-RIHED, n.d., paras. 1-2). Until 2018, only twelve higher education institutions from the Philippines *had been selected* by the CHEd to participate in AIMS. Selection is based on the CHEd's quality assurance system, and HEIs' membership in international organizations. The selected universities are: Ateneo de Manila University, Central Bicol State University of Agriculture, Central Luzon State University, Central Mindanao University, De La Salle University, Lyceum of the Philippines University- Batangas, Saint Louis University, St. Paul University of the Philippines, University of Mindanao, University of the Philippines, University of Santo Tomas, and University of St. La Salle. Mobility is also limited to seven fields of study: hospitality and tourism, agriculture, language and culture, international business, food and technology, economics, and engineering (CMO 11, 2014).

UMAP (University Mobility in Asia and the Pacific) was founded in 1991 as a voluntary association of government and non-government representatives of universities in the Asia-Pacific Region. It aims to enhance understanding between member countries and territories through collaboration among universities and mobility of university students and staff (UMAP, n.d.). Through 2019, 36 countries participated in UMAP, including the USA, Canada, Mexico, Chile, Ecuador, Peru, and Réunion. Evidently, its membership has extended beyond the Asia-Pacific Region. In the Philippines, 85 universities are UMAP members. The CHEd's International Affairs Service (IAS) also serves as the UMAP National Secretariat (CMO 33, 2013).

These three programs are the main mobility schemes that the CHEd directly administers and for which the CHEd has issued policy guidelines for participation. Philippine higher education institutions are also actively involved in the European Union's ERASMUS+ programs. However, application and participation to these programs is mainly by competition. Notwithstanding, the administration of the ASEAN mobility schemes illustrates the CHEd's regulative function, not only in regard to the control of information flow (who receives what kind of information), but also in terms of who or which higher education institution qualifies to participate in the schemes. Although, in the case of UMAP, membership is open to accredited universities, the fact that the CHEd serves as the National Secretariat puts the CHEd in control. This suggests that participation in these mobility networks is limited to HEIs which the CHEd deems eligible or qualified. This concerns the issue of elitism insofar as highly ranked and top performing Philippine HEIs, which already have exposure in the international field, will continue to secure their advantage in the competition with other local HEIs.

## 6. Summary and conclusion

The main goal of this research is to examine the ideologies and paradigms that underpin the Philippine's approach to internationalization of higher education. To achieve this goal, I asked three research questions that center on elucidating and interpreting the discourse strands that imprint on the the country's policies and discursive practices in internationalization. I employed the Discourse-Historical Approach developed by Wodak and others primarily because it highlights the use of argumentation schemes and the importance of socio-historical context in studying text and talk. My analysis shows four interwoven discourse strands prominent in the policy documents included in the dataset: marketization, quality and quality assurance, ASEAN, and nation. The discourse topoi that frame these discourse strands reveal two discursive superstructures that mobilize and legitimize neoliberal ideologies on the one hand, and the ideology of the nation as regimes of truth, on the other hand.

In essence, the Philippine government understands higher education as an economic tool, as a mechanism for producing knowledge for (technological) innovation to achieve national security. This differs from the concept of *Bildung* in the sense of continuous engagement with one's life situation and with different ways of viewing the world. The goal of *Bildung* as a dynamic process in this regard is to develop one's self-determination and self-consciousness (Hynes, 2014, p. 79). The Philippine government's view of higher education as a lever for economic development follows the neoliberal economic ideologies promoted by supranational organizations such as the WB, the WTO, and UNESCO, as well as the ASEAN regional bloc. Thus, the Philippine government's approach exemplifies what Bamberger et al. (2019) call neoliberal internationalization. At the same time, the ideology of the nation found in the policy documents serves two competing purposes: one, it legitimizes the neoliberal ideology, and two, it justifies the state's instruments of control. In the particular case of the Philippines, both of these ideologies normalize inequalities within the higher education sector.

### 6.1. Limitations of the research findings

The study I conducted is small in scale and limited in scope. Thus, the claims I make are modest and tentative. In a small-scale qualitative research project, the size of the data set and the information contained therein are inherently limited.  The data I analyzed focus on publicly accessible government policy texts, and press releases from the CHEd. As such, they do not convey how the policies are received by the stakeholders, how higher education institutions implement the policies, what the outcomes are, or how effective the policies are in achieving their aims. These documents do not capture the complexity of the policy process, nor do they reveal the specific individual actors that configured the policy. Although the documents were constructed by specific individuals who have their own biases and values, I lack understanding

of the agency of these individuals due to my distance as a researcher to the policy process and to the CHEd. What individual values the policymakers and policy actors hold are difficult to determine because of their anonymity in the documents. An exemption to this is the policy document that includes the explanatory note by the author of the R.A. 11448. The structuration of the policy problem is a result of my inference from reading the data and path-tracing of the policy history. Moreover, the press releases are official communication documents and thus only promote positive images of the state and its government agencies. My analysis is also based on the assumption that the policy texts and press releases convey official political standpoints and administrative directives and, as such, they have legal and practical consequences for the higher education sector. Notwithstanding, my analysis does not include the dynamic process of policy implementation.

The interpretation and analysis I offer are only one possibility among other possibilities. This is in part due to the constraints of the methods of analysis I employed. My deliberate decision to focus on the argumentation schemes or discourse topoi, led me to set aside other features of the documents which could have allowed for a different interpretation of the texts. In addition, the process of path-tracing is an example of how social constructionism manifests in policy analysis. It shows how the researcher re-constructs ideas and ideologies by collecting information from different sources and interpreting their connection to the research topic, particularly concepts that are constitutive of the policy under investigation. On the other hand, it also shows the fragmented nature of policy analysis. Assumptions underlying the policy are left-out or unwritten in the documents due to the need for brevity or constraints related to the genre of policy making. This demonstrates the following issues. First, the need to limit the scope of the data needs to be mitigated through triangulation. Therefore, triangulation must be the standard in policy analysis if the goal is to reveal the underlying assumptions and ideologies that are constitutive of the policy, but remain hidden in the main policy document. Second, the researcher must also pay careful attention to how language is used in policy, specifically how ambiguity can be a strategy to manipulate the public to promote a certain discourse over another. Third, it is necessary to examine information contained in footnotes or appendices, or information mentioned only in passing in policy documents because this information can be critical sources that could help reveal hidden assumptions and values of policymakers. Fourth, path tracing has implications to how the researcher treats policy documents as a corpus and unit of analysis. Instead of perceiving or identifying them as the authoritative source of information, they should be examined with care and at best as starting point for further search for evidence, clarification, insights, and explanations. It requires looking at policy documents from a different angle, that is, as part of a whole network of policy ideas.

The methodology I chose is mainly rooted in Western ideologies, thus I operate within the Western research tradition. I therefore acknowledge that particularly in the context of the Philippines as a postcolonial state, indigenous approaches to methodologies as suggested by Tuhiwai Smith (2012) could be more productive in critiquing the impact of the ideologies that are embedded in the documents.

The implication of the context-situatedness of my study is that my findings are applicable only within a specific time-period, and only in relation to the data that I studied. This allows for audit trailing or confirmability of my analysis. But what occurs outside of this timeframe is beyond the scope of my study. I recognize that policy texts are basically 'archive' materials, and their validity is contingent on the political landscape and the changing political agenda. Nevertheless, it is my hope that the reader will be able to replicate some elements of the research into their own contexts.

## 6.2.    Directions for further research

The internationalization of Philippine higher education is a work-in-progress and there is still so much to be done if the policy aims are to be achieved alongside social equity. Although research on internationalization of higher education in the Philippines has been gaining traction since 2016, directions for the future of research in this field remain varied. Based on the results of this study and on my preliminary interviews with stakeholders, the following issues still need to be examined. The list provided here is not exhaustive, but it serves as a signpost for possible directions for further research.

### 6.2.1.  Policy analysis

These include the outcomes of the current policies, specifically in relation to the type and status/rank of the HEIs. For example, are there differences in outcomes for SUCs, LUCs, private HEIs? What are the sources of differences in outcomes and why? What policy alternatives are available? How do the various stakeholders impact the policy process? What types of coalitions are formed and how do they relate to each other? Moreover, the issue of 'soft power' needs to be examined. There are strong indications of the exercise of 'soft power' by particular international stakeholders in the local policy processes, such as the British Council on the formulation of R.A. 11445, the European Union through Erasmus-Mundus, EU-SHARE project, and the ANTENA initiative or the USA through research collaborations with local universities. In other words, how do various global actors impact the local policies, and what does it mean to local stakeholders? More importantly, how does it change the policy landscape in the country?

### 6.2.2. Agency and Identity

The role of agency in relation to internationalization of higher education and mobility programs in the Philippines. Despite the energetic promotion of mobility schemes, such as the Erasmus Mundus scholarship which is touted in the media as a prestigious scholarship, more research is needed to understand how individual agency interplays with socio-cultural and political contexts of internationalization. Relevant foci are, for example, the motivations and aspirations of individuals for participating in internationalization activities, especially in mobility schemes, as well as the impacts of the programs on graduate employability locally and abroad. Related to the question on agency is identity construction. Thus the question could be articulated: How does internationalization of higher education mediate identity construction amongst the various stakeholders?

### 6.2.3. Labor migration and brain drain

Internationalization of higher education, labor migration, and brain drain are correlated issues that need to be examined in the context of the Philippines. How is internationalization of higher education related to labor migration, particularly of highly-skilled workers? How does it impact the social landscape? How does it impact the domestic labor market? How does the issue of brain drain relate to internationalization of higher education? Which disciplines are impacted by brain drain? How can the negative effects of brain drain be mitigated?

### 6.2.4. Others

Further focus could also include the impacts of TNE on the higher education landscape, on the relations between foreign and domestic higher education institutions, and the kinds of competitions/collaboration TNE creates.

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# 8. Appendix

## 8.1. Preliminary codebook

| Name | Description |
|---|---|
| Definitions of Concepts | How is the concept defined? Positive? Negative? Comparative? |
| Internationalization | Knight's definition? Alternative definition? What's the impact? |
| Cross-border | What formal definition is used? Focus on geographical location? |
| Home-based | What formal definition is used? Focus on curriculum? |
| TNE | What formal definition is used? Focus on the market? |
| Quality | How is quality defined? Alternative definitions? What are the indicators? |
| Exceptional | How is this defined? |
| Fitness for Purpose | How is this defined? |
| Transformational | How is this defined? |
| Quality Assurance | What is QA? Role? Impact? |
| Accreditation | Purpose? |
| Deming Cycle | Impact to approach? |
| Overall approach | What is the overall strategy? What's the impact? |
| Discourse Strands | Major discursive ideas found in the data; major ideas that summarize the smaller topics and themes, including fragments. |
| ASEAN | References to ASEAN and its related concepts such as the ASEAN Economic Community, including events and activities that refer to ASEAN, such as the ASEAN Qualifications Reference Framework, Symposium, etc. |
| Agreements | Any type of agreements signed by the CHEd and the PH government. |
| Discursive Events | Events that have substantial impact on policy, such as reforms. Is this AEC? |

| Name | Description |
| --- | --- |
| Improve PHE System | Is this an indicator of quality? What is the purpose of this in the overall approach? |
| Promotes AEC | What is the purpose of this? |
| Mobility | Definition? Purpose? Implication? |
| Marketization | References to the idea or concept of the market, marketization, commodification, competitiveness, labor market, etc. |
| Competitiveness | Why? Purpose? |
| Reality | Attitude: this is the reality, we have to accept it. We can't change it. |
| Nation | References to the nation and its many variations, such as local, Philippines, etc. |
| Economic Development | How is this related to the internationalization strategy? |
| Foreign Policy | Why is this important? Impact to internationalization? |
| HR Development | How is this related to the internationalization strategy? |
| National Commitments | Why is this important? Impact to internationalization? |
| National Competitiveness | How is this related to the internationalization strategy? |
| National Development Goals | How is this related to the internationalization strategy? |
| National Identity | What is national identity in relation to internationalization? Internal vs external framing? "Außenwirkung?" |
| National Interests | What are the national interests? How is this related to internationalization |
| Economic goals | Is this different from economic development? |
| Filipino Identity | See national identity. Is there A Filipino identity? |
| Social Goals | What are the social goals? Impact to internationalization? |

| Name | Description |
| --- | --- |
| National Needs | How is this different to national goals? |
| National Security | This is mentioned in the majority of the policy documents. Why? |
| Competition | Competition between PHEIs and FHEIs? Labor market competition? Geographical boundaries? |
| Violation of immigration laws | Only mentioned in relation to international incoming students. Why? |
| National Sovereignity | This is mentioned in the majority of the policy documents. Why? |
| Philippine Constitution | This is almost always mentioned in the policy documents. Why? |
| Reciprocity | What does this mean? |
| International Standards | How is this related to quality? |
| Quality and Control | How is this related to the QA system? Impact to internationalization strategy? |
| Quality of foreign HEIs | Mentioned in relation to TNE. Impact to the overall approach? |
| Interdiscursivity | Link to other discourses within and outside internationalization. |
| Intertextuality | Link to other texts within and outside internationalization. |
| Conventions | Impact to overall strategy? Soft power? |
| Experts | Who are the experts? |
| International Organizations | Impact to overall strategy? Soft power? |
| Local Laws | Conflict of interest? |
| Relationship | Relationship between CHEd and other HEIs |
| CHEd Legitimization | CHEd legitimizes itself. |

| Name | Description |
| --- | --- |
| Definition of foreign students | How are students described? |
| Definition of HEIs | How are HEIs described/categorized? |
| Legitimate interests | Who defines these? |
| Limitation | Who sets limitations? |
| Privileged HEIs | Who defines these? |
| Privileged Persons | Who defines these? |
| Punishment | When are punishment levelled? |
| Responsibility | Who are responsible for what? |
| Reputation | How is this related to quality issues and to internationalization? |
| Academic staff | Who belongs to this circle? |
| FHEIs | How are foreign institutions perceived? |
| Filipino Students | Who are Filipino students? How are they described? |
| Foreign Students | Who are foreign students? How are they described? |
| Stakeholders | Who are the stakeholders of internationalization? |

| Name | Description |
| --- | --- |
| Advantage or Usefulness | It is to our advantage, thus we do it. |
| Burden | We have a burden that we need to mitigate. |
| Commitment | We have signed for it. |
| Compliance | It is the law, thus compliance is required. |
| Consequence | A causes B (causal link). |
| Control | We need to define how things are done. |
| Deficiency | We need to take action to mitigate our deficiency. |
| Expert Opinion | Expert says so, thus it must be correct. |
| Law | It is the law (mandated by law) thus it must be done. |

| Name | Description |
|---|---|
| Opposites | A cannot be B, because they have opposite properties. |
| Protection | This needs to be protected (due to threat?) |
| Reality | This is the reality, we have to accept it. It is inevitable. |
| Regulation | Regulation is necessary for something to occur. |
| Responsibility | It is our responsibility, thus we must prescribe what is to be done. |
| Threat | If something is a threat, this needs to be apprehended (or something needs to be done if the national security is under threat). Is this similar to the burden? |

## 8.2. Resource persons

To maintain anonymity of resource persons and confidentiality of information, only the initials of the resource persons are indicated on this list.

| | |
|---|---|
| BZ | University faculty member |
| BP | Public servant |
| BG | University faculty member |
| DLG | University faculty member |
| JJ | University faculty member |
| MR | Public servant |
| MV | University faculty member |
| MLF | Public servant |
| MMA | University faculty member |
| PJ | University faculty member |
| QE | University faculty member |
| RZ | University faculty member |
| RR | University faculty member |
| SR | University faculty member |
| SR | Public servant |
| SF | University faculty member |
| YSC | Public servant |
| YF | University faculty member |

## 9. Detailed table of contents