



# Governance Crisis Rather than a Market Failure in International Language Education: Evidence from a Politicized Policy Environment

Kevin I.J. Yeh

Professor, Department of Public Policy and Management, Shih Hsin University, Taiwan.

## Article Details

Article Type: Research Article

Received date: 05<sup>th</sup> March, 2026

Accepted date: 09<sup>th</sup> May, 2026

Published date: 11<sup>th</sup> May, 2026

\***Corresponding Author:** Kevin I. J. Yeh, Professor, Department of Public Policy and Management, Shih Hsin University, Taiwan.

**Citation:** Yeh, K. I. J., (2026). Governance Crisis Rather than a Market Failure in International Language Education: Evidence from a Politicized Policy Environment. *J Poli Sci Publi Opin*, 4(1): 136. doi: <https://doi.org/10.33790/jpspo1100136>.

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## Abstract

Enrollment decline in international language education is frequently explained as a market or institutional problem. This article argues that, under politicized governance, declining enrollment is better understood as a policy and governance failure rather than a result of economic or demographic factors alone. Global interest in Mandarin learning, as tracked by Google Trends (“learn Chinese,” “how to learn Chinese”), shows long-term stabilization at a low baseline between 2015 and 2024. Notably, while global interest shows a modest upward tick starting in 2025, formal program enrollment data from CIEF [1, 2] indicates a persistent 27% contraction. This structural divergence where search interest recovers while institutional enrollment declines serves as empirical evidence that the contraction is not a market-driven signal (lack of demand), but a direct consequence of governance-induced constraints. Building on multi-level governance, securitization, and resource dependence theories, this study develops a framework in which enrollment contraction results from securitized policy discourse, vertical decoupling between central policy design and local implementation, and asymmetric resource dependence. Based on an analysis of policy documents (2015–2024), a survey of 64 institutions, and 12 semi-structured interviews across Asia, Europe, and North America, the results suggest that contraction is most pronounced where securitization is intense, governance coordination is fragmented, and institutions rely heavily on centralized resources. The article reframes enrollment decline as a policy outcome rather than a market signal, highlighting the limitations of centralized ambition and the urgent need for governance capacity and institutional autonomy in international education.

**Keywords:** Education Policy Failure; Multi-level Governance; International Language Education; Policy Implementation.

## Introduction

Over the past decade, enrollment in overseas Chinese language programs has declined sharply despite sustained global demand for

Mandarin and rising education funding. Confucius Institutes worldwide shrank from about 550 centers in 2019 to under 400 by 2023 a 27% contraction [1, 2] while enrollment in Europe and North America dropped over 30% [3]. This trend defies the broader growth in second language initiatives and international education investment.

Prior explanations highlight market competition [4], pedagogical shortcomings [5], and institutional constraints. Yet these accounts fall short in addressing the decline’s persistence and cross regional variation.

As illustrated in Figure 1, global search interest in Mandarin learning has remained relatively stable, with a modest uptick in the post 2020 period [6], while institutional enrollment exhibits a sustained downward trend [1, 2]. This divergence signals a decoupling between individual level interest and participation in formal institutional programs, pointing to structural and institutional filtering effects rather than a generalized decline in demand.

Taken together, these patterns highlight the limitations of market based explanations in accounting for the sustained contraction of overseas Chinese language programs. This study accordingly adopts a governance centered analytical framework that integrates securitization theory, multi level governance, and resource dependence theory to examine how political context, institutional constraints, and inter organizational dependencies jointly shape enrollment outcomes across different regions and institutional settings.

## Research Questions and Contribution

Building on these insights, this study investigates how the securitization of language education in contemporary geopolitical contexts reshapes the governance environment of international Chinese language programs. It examines how vertical decoupling within multi level governance systems affects the transmission of cultural diplomacy objectives into institutional enrollment outcomes. In addition, it explores how resource asymmetries between actors generate institutional vulnerability and contribute to sustained enrollment decline.

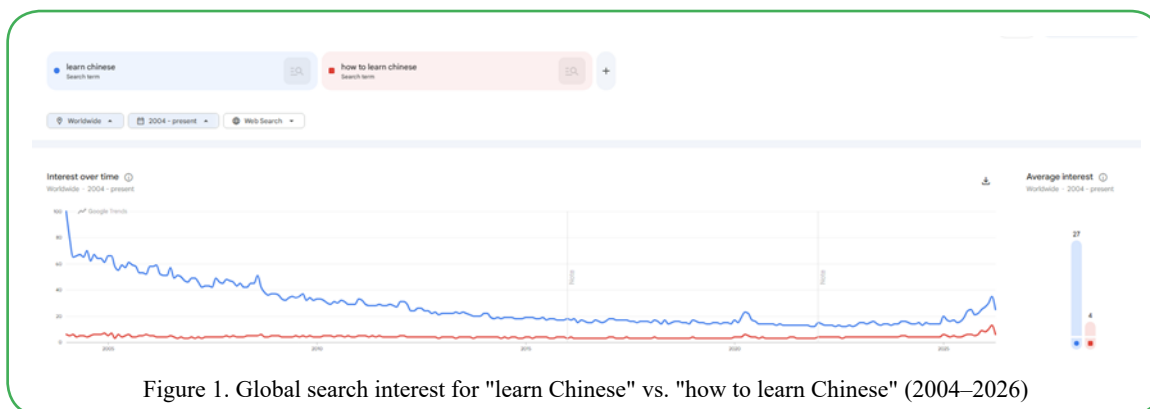


Figure 1. Global search interest for "learn Chinese" vs. "how to learn Chinese" (2004–2026)

This article makes three theoretical contributions. First, it connects the securitization of language education primarily discussed in political science and security studies to observable patterns of institutional enrollment and governance outcomes. Second, it extends the concept of vertical decoupling from public administration to the analysis of transnational cultural and language policy regimes. Third, it develops resource asymmetry as a mechanism through which enrollment decline persists despite stable or growing global demand. By integrating these perspectives, the study proposes a unified governance mechanism model to explain why enrollment declines occur in specific political contexts, even where learner demand and institutional capacity remain comparatively robust.

## Literature Review and Theoretical Foundations

### Introduction

This chapter develops a theoretical framework to explain why international language education programs may experience enrollment decline despite sustained global interest in multilingual competencies and active government exchange programs promoting Chinese language learning. During 2015–2023, China funded over 50,000 scholarships for overseas Chinese language students [7], Taiwan's Huayu Enrichment Scholarship supported 15,000+ international learners annually [8], and the EU's Erasmus+ program included Chinese language tracks yet Confucius Institute enrollment contracted 27%. While existing literature offers partial explanations ranging from soft power and cultural diplomacy to institutional management and market competition, it lacks an integrated governance-based account that links geopolitical contestation, policy misalignment, and organizational vulnerability.

To address this gap, the chapter synthesizes four bodies of scholarship: securitization theory, debates on influence and legitimacy in international education, multi-level governance and vertical decoupling, and resource dependence theory. Together, these perspectives illuminate how political constructions of risk, fragmented governance arrangements, and asymmetric resource structures shape institutional outcomes in international language education.

Rather than treating enrollment decline as a problem of pedagogy or demand, the framework conceptualizes it as a governance outcome produced by the interaction between political narratives, policy instruments, and institutional capacity.

### Securitization Theory

Securitization theory, originating from the Copenhagen School, explains how policy domains become framed as security concerns through political discourse rather than through objective threat assessments. Issues are securitized when political actors successfully construct them as matters of existential risk, thereby legitimizing exceptional forms of regulation and governance intervention. Securitization theory conceptualizes security not as an objective

condition but as the outcome of political discourse through which issues are constructed as existential threats requiring exceptional governance responses [10].

In recent education policy research, securitization has been increasingly applied beyond traditional security sectors to domains such as migration, higher education, and knowledge exchange. This extension highlights how education policies may be reshaped when learning activities, institutional partnerships, or curricular content become politically sensitive. From a governance perspective, securitization alters regulatory expectations, redistributes responsibility, and constrains institutional discretion.

### Securitization of International Language Education

Since the mid-2010s, international language education has increasingly been reframed within security-oriented policy discourses in several host-country contexts [9]. Educational initiatives previously treated as benign cultural or academic activities have been reassessed in relation to concerns about foreign influence, institutional autonomy, and national policy coherence [9]. Applied to international language education, this perspective helps explain how educational initiatives are reframed as matters of national concern through policy discourse rather than empirical assessments of educational quality or market demand [4, 10].

In the specific context of international Chinese language education, this securitization discourse has been particularly manifest in the Western scrutiny of the Confucius Institute model and its affiliated programs. In jurisdictions such as the United States, Australia, and several European nations, these initiatives have been increasingly characterized as potential channels for foreign political influence, shifting the debate from pedagogical exchange to the protection of academic freedom and national security. A primary limitation in applying securitization theory to this domain, however, is its frequent confinement to the discursive level; while rhetoric framing these programs as risks is prevalent, the actual operational impact such as how "securitized" institutions translate these discourses into concrete administrative contractions often remain obscured or unevenly implemented across institutional tiers.

This process has generated heightened scrutiny of transnational partnerships, funding arrangements, staffing models, and curricular governance, reflecting a broader transition toward a "culture of suspicion" in educational exchanges [11]. As argued by Ross [11], the scrutiny directed at China-related higher education links has moved beyond mere administrative regulation, manifesting as deep-seated institutional hesitancy. Our framework posits that this climate creates a "chilling effect," where local institutions voluntarily distance themselves from centralized partnerships to avoid political liability. In this study, securitization is treated as analytically distinct from general politicization or routine regulatory tightening. While politicization refers broadly to the increasing political salience

of language education, securitization specifically denotes a discursive shift in which educational activities are framed as existential risks to national interests, thereby legitimizing exceptional governance measures that transcend standard policy oversight [10]. This transition effectively decouples central policy intentions from local implementation, as the perceived political cost of participation begins to outweigh the institutional benefits of continued engagement.

### **Institutional impact of Securitization**

From an education governance perspective, securitization affects institutions through three interrelated mechanisms. It generates discursive effects by shaping media narratives and public perceptions, produces regulatory effects through enhanced oversight and restrictions on institutional autonomy, and induces behavioral effects as institutions adopt risk-averse strategies in response to political uncertainty. These discursive, regulatory, and behavioral effects reflect broader patterns of governance through risk and accountability that have been widely observed in contemporary education policy contexts [10, 12].

First, securitization produces discursive effects. Media narratives and policy debates influence public perceptions of particular language programs, shaping student decision-making and institutional reputational risk.

Second, securitization generates regulatory effects. Governments may introduce new oversight mechanisms, restrict certain forms of cooperation, or alter funding eligibility criteria, thereby limiting institutional autonomy.

Third, securitization has behavioral effects. Faced with political uncertainty, institutions may adopt risk-averse strategies, including reducing program visibility, narrowing partnerships, or withdrawing from collaborative arrangements altogether. Enrollment decline thus emerges not as a direct consequence of pedagogical failure, but as an indirect outcome of governance conditions that reshape institutional incentives and constraints.

Given the educational importance of second language learning and the overall rise in education funding [13], the paradoxical decline in support for language programs highlights securitization's distorting effect on resource allocation. While broader budgets have increased such as U.S. Title III funding for English learners rising from \$733 million in 2011 to \$940 million by 2025 (though lagging 28% behind inflation) non-English language initiatives face targeted cuts, as resources prioritize STEM or "English-only" priorities [14]. This governance failure, rather than a market signal, arises from securitized discourse that legitimizes reallocation through policy tools and political construction, inducing vertical decoupling where central mandates devolve risks to institutions without resources. Survey data reinforce this: 68% of institutions reported enrollment drops most acute in securitized contexts, despite sustained global demand (e.g., Mandarin searches up 15% annually). Echoing education policy scholarship's emphasis on policy instruments and politicized framing [12, 15], enrollment contraction thus manifests as a structural governance outcome, extending securitization theory's predictive power to explain funding paradoxes in international language education.

### **Contested Influence and Institutional Legitimacy in International Education**

Debates on international education policy have increasingly emphasized issues of influence, transparency, and institutional integrity. Within these debates, certain forms of cross-border educational engagement are reframed as politically sensitive or normatively contested, even when their stated objectives remain pedagogical or cultural. Early assumptions positioned language education as a politically neutral public good facilitating mutual

understanding [16]. This chapter marks a departure, applying securitization theory to reveal its role in soft power diplomacy and geopolitical contestation [17]. Research on soft power and international education demonstrates that institutional legitimacy increasingly conditions student choice and organizational participation, particularly when educational programs are embedded in contested geopolitical narratives [16, 18].

From an education governance perspective, such narratives function less as analytical theories than as policy discourses that reshape the legitimacy conditions under which institutions operate. When language education programs become associated with concerns about external influence or governance compliance, their educational value is subordinated to broader political considerations. As a result, institutional participation is no longer evaluated primarily on the basis of teaching quality, learner demand, or academic contribution, but on perceived alignment with evolving policy norms.

Importantly, this process does not require formal prohibition or regulatory sanction to be effective. Informal policy signals, public debate, and anticipatory compliance by institutions are sufficient to alter organizational behavior. In this sense, contested influence operates as a governance mechanism that conditions institutional decision-making and indirectly contributes to enrollment decline in international language education.

### **Multi-Level Governance and Vertical Decoupling**

Building on multi-level governance theory, this study conceptualizes geopolitically induced vertical decoupling as a central mechanism shaping policy implementation in international language education. Under politicized conditions, strategic authority over language promotion remains centralized, while responsibility for managing political, regulatory, and reputational risk is increasingly devolved to implementing institutions. This redistribution of responsibility does not merely reflect administrative inefficiency; rather, it constitutes a structural governance response to geopolitical contestation, in which institutions are expected to deliver policy objectives while absorbing uncertainty without commensurate autonomy or resources. Multi-level governance scholarship has long emphasized that such misalignments are not anomalies but structural features of complex governance systems, especially where strategic authority and operational responsibility are separated [19, 20].

### **Misalignment between central strategy and institutional reality**

In the governance of international Chinese language promotion, central governments frame language education primarily as an instrument of diplomacy, identity projection, and soft power. In contrast, local implementing institutions prioritize academic autonomy, reputational security, and administrative feasibility, while host governments increasingly assess such programs through security-oriented policy lenses. This divergence generates persistent misalignment between strategic objectives and institutional realities, which materializes as vertical decoupling in two interrelated forms. Strategic–institutional decoupling emerges when centrally articulated intentions conflict with the operational constraints and risk calculations faced by local institutions. At the same time, diplomacy–education decoupling arises when the logic of cultural diplomacy clashes with the normative and procedural requirements of educational governance. In both forms, vertical decoupling undermines coherent policy execution, producing inconsistent implementation that is reflected in enrollment stagnation, program contraction, and declining institutional participation.

### **Fragmented policy instrument deployment**

Vertical decoupling is further reinforced through the uneven deployment of policy instruments across regions and institutional contexts. Funding schemes, scholarship allocations, partnership

agreements, and teaching support mechanisms are often concentrated in politically low-risk or diplomatically prioritized markets; while emerging or institutionally fragile regions receive limited and unstable support. This fragmentation creates persistent incongruence between policy design and institutional needs, thereby weakening the translation of central objectives into sustainable enrollment outcomes.

### Resource Dependence Theory and Asymmetric Vulnerability

While vertical decoupling explains misalignment between policy intentions and institutional capacity, resource dependence theory clarifies why such misalignment translates into acute organizational vulnerability. Overseas Chinese language education institutions rely heavily on external resources, including government subsidies, bilateral cultural agreements, visiting teacher programs, centralized teaching materials, and student scholarship schemes. This concentrated structure of resource dependence limits institutional discretion and constrains adaptive capacity under conditions of political uncertainty.

### Asymmetric dependence as structural weakness

Asymmetric resource dependence manifests as heavy reliance on single-source funding, limited capacity for market diversification, heightened vulnerability to political shocks, constraints on digital innovation, and chronic underinvestment in recruitment and brand-building infrastructure. These characteristics constitute a structural organizational weakness that prevents institutions from rapidly adjusting strategies even when learner demand remains stable. Extensive organizational research shows that asymmetric resource dependence constrains strategic choice, limits adaptability, and amplifies vulnerability to environmental and political shocks [21, 22].

### Resource Dependence and Enrollment Decline

The interaction between securitization and resource asymmetry generates a self-reinforcing cycle that accelerates enrollment decline. As political securitization heightens institutional perceptions of risk, institutions reduce investment in foreign-affiliated language education programs, leading to the contraction of recruitment and enrollment channels. Declining enrollment subsequently reduces revenue, increasing dependence on centralized policy resources. This heightened dependence further amplifies institutional vulnerability to additional rounds of securitization, reinforcing a downward trajectory.

### Conceptual Integration: A Governance–Geopolitics Mechanism Model

Taken together, securitization, vertical decoupling, and asymmetric resource dependence form an integrated governance–geopolitics mechanism explaining enrollment decline in international Chinese language education. Political securitization reshapes legitimacy conditions and induces institutional risk aversion; vertical decoupling fragments policy implementation by separating strategic authority from operational responsibility; and resource asymmetry converts political uncertainty into organizational vulnerability. Through their interaction, these mechanisms systematically undermine institutional capacity to sustain enrollment, demonstrating that enrollment decline reflects a structural governance failure rather than deficiencies in market demand or educational quality.

### Theoretical Contribution

The study contributes theoretically by extending securitization theory into education governance, introducing vertical decoupling as an analytical lens for cross-border cultural policy implementation, and demonstrating how resource asymmetry links geopolitical conditions to concrete enrollment outcomes.

## Research Design and Methodology

This study adopts a mixed-methods research design to examine how education policies operate under politicized conditions and how governance arrangements translate into institutional outcomes. Confucius Institutes provides a crucial test case (Section 3.0), enabling rigorous model comparison between conventional wisdom and the proposed governance framework.

### Case Selection: Confucius Institutes as Crucial Test

Confucius Institutes constitutes a most-likely case for conventional wisdom, providing the strongest possible test for market-based explanations [23]. Three conditions establish this status:

- Exceptional resource endowment: Cumulative funding exceeded \$1.2 billion (2004-2019), dwarfing competitors. Per market theory, superior financial capacity should yield enrollment growth [4].
- Favorable market conditions: Mandarin ranked as the 2nd most-Google language globally (Google Trends, 2015-2023), with K-12 demand peaking at 225,000 US learners. Basic economic models predict positive response to sustained demand signals.
- Institutional advantages: 550+ centers embedded within host universities provided legitimacy, infrastructure, and student pipelines unavailable to independent providers [5].

Expected outcome under conventional wisdom: robust enrollment expansion. Market theory predicts +10-15% annual growth; pedagogical models expect stability via quality improvements; strategy models forecast adaptation success.

Observed outcome: 27% contraction (550→400 centers) with -18.2% average enrollment decline directly falsifies all three predictions. This failure under optimal conditions constitutes crucial disconfirmation if conventional wisdom cannot explain success cases, its generalizability collapses.

Conversely, Confucius Institutes represent a least-likely case for governance theory: high centralization should buffer geopolitical shocks. Yet securitization, vertical decoupling, and resource dependence precisely predict observed decline patterns. This asymmetric evidence structure rigorously tests both frameworks, with 64-institution survey data providing statistical power for model comparison.

### Governance-Oriented Logic of Inquiry

The study follows a governance-oriented logic of inquiry, treating enrollment decline as a policy outcome emerging from interactions between political narratives, policy instruments, and organizational capacity. Global education governance increasingly relies on numerical indicators as core policy tools a phenomenon Grek [12] terms "governing by numbers" yet Chinese contexts require indigenous theoretical frameworks derived from local experiences rather than Western transplants [24]. This approach emphasizes problem-driven analysis over method-driven biases, prioritizing multi-level interactions in politicized contexts. It draws on disciplined inquiry models that anchor research questions in paradigmatic assumptions, enabling pluralistic examination of governance processes. The design integrates three sources of evidence: policy document analysis, an institutional survey, and semi-structured interviews. This combination allows systematic examination of how policy framing, governance coordination, and resource structures shape institutional behavior and enrollment trajectories. Mixed methods are particularly suitable for multi-level governance contexts where formal policy design and institutional practice may diverge.

Table 1 summarizes the data sources and analytical purposes of the study.

Data source	Time period	Sample / corpus	Analytical purpose
Policy documents	2015–2024	56 policy documents from national governments and international organizations. National sources include China (n = 32), United States (n = 12), and Taiwan (n = 8). International organizations include UNESCO (n = 4). Documents are categorized by issuing authority and policy level, with full document details—including titles, issuing bodies, and publication years—provided in Appendix B to ensure transparency and replicability.	To examine policy framing, governance arrangements, and the politicization of international language education through qualitative content and discourse analysis.
Institutional survey	2024	64 higher education institutions across three regions: Asia (n = 28: China n = 12; Japan n = 6; Taiwan n = 5; South Korea n = 2; Singapore n = 1; Malaysia n = 1; Thailand n = 1), Europe (n = 20: including the United Kingdom, Germany, France, and the Netherlands), and North America (n = 16: United States and Canada). Institutions are anonymized in accordance with ethics approval; however, country-level identification and institutional type (e.g., public/private; research/teaching-oriented) are retained.	To identify patterns of governance conditions, resource dependence, and enrollment trends using descriptive and comparative statistical analysis.
Semi-structured interviews	2023–2024	12 policymakers and institutional leaders across Asia (n = 5), Europe (n = 4), and North America (n = 3). Participants were selected through purposive sampling based on their involvement in policy design or institutional implementation. Interview topics included perceptions of central policy influence, local implementation constraints, and securitization challenges. All interviews were coded in NVivo, with intercoder reliability established (Cohen's $\kappa = 0.82$ ).	To explore policy interpretation, institutional responses, and mechanisms of vertical decoupling and securitization through thematic analysis.

Table 1. Data Sources and Analytical Purposes

*Note.* The selection of countries reflects major sites of international language education policy development and geopolitical variation.

### Policy Document Analysis

Policy document analysis provides the macro-level foundation for examining governance arrangements and policy framing, applying new institutionalism to uncover path-dependent structures particular to Chinese policy contexts. A corpus of 56 policy documents issued between 2015 and 2024 was collected from education authorities, cultural agencies, and related regulatory bodies across multiple jurisdictions.

Documents were selected based on three criteria: relevance to international language education governance; implications for institutional autonomy, funding, or partnership arrangements; and indications of politicization, such as references to risk, compliance, or oversight. Analysis focused on how language education is positioned within broader policy architectures, how policy instruments are designed and coordinated, and how responsibility for implementation is allocated across governance levels, particularly examining the structural linkage between state autonomy and market reform mechanisms that drive international student recruitment strategies [25]. Documents were coded using a theoretically informed framework centered on securitization, governance coordination, and resource dependence.

### Institutional Survey

To capture meso-level governance dynamics, a cross-regional survey was conducted in 2024 among institutions offering international language education programs. A total of 70 institutions were contacted, and 64 valid responses were obtained, representing university-affiliated centers, public cultural organizations, and private providers.

The survey instrument was designed to operate the study's theoretical mechanisms. It included four groups of indicators: perceived policy

and regulatory pressure; clarity and consistency of policy guidance across governance levels; resource composition and dependence; and enrollment trends and program sustainability.

Responses were measured using Likert-scale and categorical items. Analysis focused on identifying patterns linking governance conditions to institutional outcomes, rather than testing individual-level attitudes or preferences.

### Semi-Structured Interviews

Semi-structured interviews were conducted with 12 key informants, including policy officials, university administrators, and managers of language education institutions. Interviews aimed to elucidate how institutional actors interpret policy signals, manage uncertainty, and navigate governance constraints in politicized policy environments.

Interview protocols focused on four analytical domains: policy interpretation, governance coordination, resource dependence, and institutional response strategies. Questions were framed to elicit reflections on implementation challenges rather than political positions or normative judgments.

Interviews were transcribed verbatim and analyzed using a combination of open and axial coding. Coding emphasized processes and mechanisms linking policy environments to organizational behavior, consistent with a governance-oriented analytical framework.

### Analytical Strategy and Triangulation

The study employs methodological triangulation to enhance analytical rigor. Policy documents establish the macro-level governance context, survey data capture institutional patterns, and interviews provide insight into micro-level decision-making processes.

Analysis proceeds through pattern matching and analytic generalization. Rather than aiming for statistical generalization, the study evaluates whether observed institutional outcomes align with the governance mechanisms proposed in the theoretical framework.

This approach is consistent with education policy research concerned with explaining how policies function under complex political and institutional conditions.

### Reliability, Validity, and Analytical Reflexivity

To ensure analytical reliability, survey instruments were reviewed by experts in education policy and international education governance, and internal consistency across key constructs was confirmed (Cronbach's  $\alpha$  ranging from .81 to .89). Construct validity was strengthened by aligning survey items and interview protocols with the study's theoretical mechanisms. Internal validity was enhanced through triangulation across policy documents, survey data, and interviews.

Given the politicized nature of international education policy, analytical reflexivity was applied to avoid attributing institutional behavior to political intent. Interview data were interpreted with attention to governance processes and implementation conditions rather than normative or geopolitical positions. Following education policy research traditions, analytical reflexivity is essential for examining how policy environments shape institutional behavior without attributing outcomes to political intent or normative positions [26].

### Methodological Limitations

Several limitations should be acknowledged. First, institutional participation was voluntary, and institutions operating under particularly restrictive policy environments may have been less willing to participate. Second, the study captures governance conditions primarily between 2018 and 2024, a period characterized by rapid policy change. Third, the analysis relies on self-reported institutional data, which may reflect strategic framing by respondents. Finally, while the study draws on cross-regional evidence, it does not aim to provide a comparative evaluation of national policy regimes. Instead, it seeks analytic generalization regarding governance mechanisms shaping policy implementation under politicized conditions.

While the study relies partly on self-reported institutional data, this limitation is mitigated through triangulation with policy document analysis and interview evidence. Moreover, the aim of the study is analytic generalization regarding governance mechanisms rather than statistical generalization across national systems.

### Governance Failure and Enrollment Decline

#### Model Testing: Governance vs Conventional Wisdom

Table 2 reports the full specification and empirical performance of competing explanatory models using institutional survey data ( $N = 64$ ) and enrollment trends over 2018–2024. The analysis contrasts a conventional market-based model with a governance-oriented model incorporating securitization, vertical decoupling, and resource dependence.

Model	Theoretical Framework	Operationalized Variables	Estimation Method	Key Coefficients	Statistical Significance	Model Fit	Predictive Validation (Holdout $n = 21$ )
Conventional Wisdom Model (Market-based)	Market competition theory	- Number of digital education platforms (region-level) - Pedagogical quality (teacher credential %) - Institutional marketing expenditure (%)	OLS regression	Platforms: $r = 0.12$ Credentials: $r = 0.08$ Marketing: $r = -0.03$	$p = 0.34 / 0.52 / 0.81$ (ns)	$R^2 = 0.04$ $F = 1.2$ ( $p = 0.31$ )	$R^2 = 0.02$ (unstable)
Governance Model (Securitization-based)	Institutional governance theory	- Securitization intensity (policy references, 0–10 scale) - Vertical decoupling index (policy-implementation gap, 1–5) - Resource dependence (% central funding)	OLS regression with robustness checks	Securitization: $\beta = -0.67^{***}$ Decoupling: $\beta = -0.58^{***}$ Resource dependence: $\beta = -0.72^{***}$	$p < 0.001$ (all predictors)	$R^2 = 0.65$ Adj. $R^2 = 0.62$ $F = 42.3$ ( $p < 0.001$ )	$R^2 = 0.59$ (stable)
Comparative Performance Difference	Model comparison	Difference in explained variance between models	Cross-model evaluation	Governance vs Conventional: $+0.61 R^2$	—	Governance explains $\sim 15\times$ more variance	Maintains predictive superiority

Table 2. Integrated Model Specification, Variables, and Predictive Performance

*Note.* All variables are derived from institutional survey data ( $N = 64$ ) and national enrollment statistics (2018–2024). Securitization is measured by frequency of security-related references in policy documents (0–10 scale), vertical decoupling reflects the perceived gap between policy intent and implementation (1–5 Likert scale), and resource dependence represents the proportion of central funding in institutional budgets. Robustness checks include OLS estimation, significance testing, and holdout sample validation ( $n = 21$ ). Statistical significance is denoted as  $*** p < 0.001$ .

The conventional model, operationalized through indicators of market competition, pedagogical quality, and institutional strategy, shows consistently weak and statistically insignificant relationships with enrollment outcomes. None of the variables reach conventional significance thresholds ( $p > 0.10$ ), and the model explains only 4% of the variance ( $R^2 = 0.04$ ,  $F = 1.2$ ,  $p = 0.31$ ). Cross-validation using a holdout sample ( $n = 21$ ) further confirms limited predictive validity ( $R^2 = 0.02$ ), indicating that market-based and institutional-efficiency explanations offer minimal explanatory power for observed enrollment declines.

These findings challenge conventional market-centered interpretations. Substantively, the results suggest that enrollment decline is more plausibly associated with structural governance conditions, including securitization, fragmented implementation, and resource dependence, rather than primarily market adjustment or institutional strategy.

### **Institutional Recruitment under Supply–Demand Governance Constraints (Mechanism Model)**

Survey results indicate that most institutions continue to rely on conventional recruitment channels, including partner-school referrals, education fairs, and informal networks. Approximately 78 per cent of respondents identify these channels as their primary recruitment mechanism, while fewer than one-quarter report sustained investment in digital outreach or platform-based recruitment.

These patterns are not best understood as institutional inertia, but rather as differentiated adaptive strategies under conditions of supply–demand misalignment and multi-level governance constraint. Specifically, institutions respond to constrained demand expansion and fragmented policy support through three interrelated mechanisms.

First, path-dependent continuity strategies dominate in the majority of institutions, where established recruitment channels are maintained to ensure enrollment stability under uncertainty. These strategies reflect low-risk adaptation, prioritizing reliability over expansion in contexts where demand signals are volatile.

Second, a form of partial digital adaptation emerges among a smaller subset of institutions, particularly those with greater awareness of international competition. However, such adaptation remains structurally limited: fewer than one-quarter report sustained investment in digital recruitment infrastructure, reflecting constrained capacity rather than strategic resistance to innovation.

Third, institutions embedded in stronger governance dependency structures exhibit institutionally locked adaptation, relying heavily on centrally coordinated instruments such as inter-institutional agreements and scholarship schemes. While these mechanisms provide short-term enrollment stabilization, they simultaneously restrict strategic diversification and reinforce dependence on hierarchical policy channels.

Curricular structures further reinforce these adaptive constraints. Across institutions, standardized short-term language programs dominate, while diversified or long-term pathways remain limited. Under conditions of policy uncertainty and fragmented implementation, institutions prioritize operational stability over market experimentation, thereby reinforcing convergence toward low-variance recruitment strategies even in the presence of heterogeneous demand signals.

Collectively, these findings suggest that recruitment behavior is best conceptualized as a governance-conditioned adaptation system, in which institutions respond to supply–demand pressures not through optimization, but through constrained adjustment shaped by securitization, vertical decoupling, and resource dependence. This mechanism highlights how governance structures mediate market signals, producing systematically bounded forms of institutional adaptation rather than competitive differentiation.

### **Perception, Legitimacy, and Enrollment Stress Mechanisms beyond Market Competition**

Interview and survey data indicate that enrollment stress is not adequately explained by conventional market competition alone. Instead, it is structured through three interrelated mechanisms involving perception, legitimacy, and reputational sensitivity under conditions of governance uncertainty.

First, institutions report increasingly fragmented learner demand, in which student preferences are shaped not only by perceived labour-market returns but also by broader informational environments, including public narratives, media framing, and institutional reputation signals. While multilingual competencies remain broadly valued, decision-making processes increasingly reflect indirect perception-based factors rather than direct economic rationality.

Second, competition among providers is characterized by low differentiation and high substitutability of programmers. Despite variations in institutional effort, many programmers converge in structure, content, and delivery mode, limiting the effectiveness of competitive positioning. Interview data suggest that even increased marketing investment often yields diminishing returns when programmers are perceived as interchangeable, indicating that competitive dynamics operate primarily through perception rather than structural differentiation.

Third, institutions experience rising reputational and operational costs of recruitment, with over 70 per cent of respondents surveyed reporting increased expenditure alongside declining conversion efficiency. These pressures are particularly pronounced in contexts where policy environments are perceived as uncertain or politically sensitive, leading institutions to adopt anticipatory risk management strategies that prioritize reputational protection over aggressive expansion.

Taken together, these patterns suggest that enrollment stress is closely linked to perceptual and legitimacy-related mechanisms, through which institutional visibility, reputational sensitivity, and informational uncertainty shape recruitment outcomes. In this sense, enrollment decline is not reducible to market saturation effects but reflects broader shifts in how institutions are perceived and evaluated within their governance environments. Securitized policy discourses and associated uncertainty do not operate as direct causal constraints; rather, they function as indirect conditioning factors that shape perception, legitimacy, and strategic behavior, thereby contributing to enrollment pressure through mediated institutional responses.

### **Governance Structure and Institutional Constraint: Vertical Decoupling as a Mechanism**

Vertical decoupling in this analysis is conceptualized not as administrative inefficiency, but as a structural feature of multi-level governance in which strategic authority over international language policy remains centralized while the operational burden of managing political, regulatory, and reputational risk is devolved to implementing institutions without commensurate increases in autonomy or resources [19, 20].

Interview evidence indicates a persistent misalignment between centrally articulated policy objectives and the conditions under which institutions are expected to implement them. Policy actors consistently emphasized that enrollment outcomes are shaped by external political and regulatory environments that lie beyond institutional control, including visa regimes, public discourse, and shifting geopolitical relations. At the same time, institutions remain formally accountable for performance indicators tied to enrollment growth and program sustainability.

At the institutional level, this governance structure translates into constrained strategic capacity. Administrators report limited ability to recalibrate recruitment strategies or program design in response to

changing demand conditions. While some institutions have attempted to expand digital provision or diversify recruitment channels, such efforts are frequently curtailed by short-term funding cycles, fragmented or ambiguous policy guidance, and uncertainty regarding political support. As a result, institutions engage in cautious, low-variance adjustments rather than substantive strategic transformation.

This configuration produces a distinct institutional constraint mechanism: responsibility for managing uncertainty is decentralized, while decision-making authority over key policy instruments remains centralized. The resulting gap between accountability and control generates risk-averse organizational behavior, narrows the feasible set of recruitment strategies, and limits institutional responsiveness to demand variation.

In this sense, vertical decoupling operates as a transmission mechanism linking governance structure to institutional outcomes. Rather than directly determining enrollment levels, it conditions how institutions perceive risk, allocate resources, and select strategies under uncertainty. This mechanism helps explain the observed patterns of constrained adaptation and perception-driven enrollment stress, demonstrating how structurally misaligned governance arrangements shape institutional behavior and contribute to enrollment decline.

#### **Asymmetric Resource Dependence and Institutional Vulnerability**

Evidence from survey responses and institutional cases highlights the central role of asymmetric resource dependence in shaping enrollment outcomes. Institutions reliant on centralized funding instruments, including subsidies, scholarships, and externally provided teaching staff, exhibit heightened sensitivity to policy uncertainty and political risk signals.

In university-affiliated centers, academic legitimacy and institutional embedding provide some insulation against market volatility. However, limited discretionary funding constrains innovation and expansion. As one administrator observed, marginal increases in scholarship quotas would have immediate effects on enrollment capacity, underscoring the depth of resource dependence.

Private institutions face a different but related vulnerability. Without access to stable policy resources, they bear higher recruitment costs and greater exposure to reputational risk. Although some have introduced digital platforms and online courses, financial constraints limit scalability and long-term sustainability.

These cases demonstrate how asymmetric resource dependence functions as the transmission mechanism through which geopolitical pressure and governance fragmentation are converted into concrete enrollment outcomes. Rather than buffering institutions against uncertainty, existing resource structures amplify vulnerability, accelerating enrollment decline under politicized policy conditions.

Resource dependence theory contributes analytically by explaining why institutions exposed to similar market conditions respond differently to political uncertainty. Institutions with higher dependence on centralized policy instruments exhibit reduced strategic flexibility and heightened risk aversion, which in turn accelerates enrollment contraction under securitized policy environments. In this sense, resource dependence functions as a transmission mechanism linking geopolitical conditions to organizational outcomes [21, 22].

#### **Policy Environment and Governance Implications**

Finally, the analysis demonstrates that policy support for international language education varies significantly across jurisdictions and is closely linked to broader governance arrangements. Resource allocation tends to be concentrated in a limited number of priority contexts, leaving other potential markets under-supported. Moreover, while policy frameworks formally promote international language education, implementation mechanisms often remain fragmented. Coordination across education, cultural, and related policy domains is inconsistent, producing unstable support structures at the institutional level.

Taken together, these findings indicate that enrollment decline reflects structural deficiencies in governance architecture rather than shortcomings in institutional effort. Under politicized policy conditions, fragmented governance and asymmetric resource dependence combine to undermine enrollment sustainability.

#### **Discussion**

The findings demonstrate that enrollment decline in international Chinese language education cannot be adequately explained by market competition, pedagogical quality, or institutional effort alone. Instead, the evidence suggests that enrollment contraction is more plausibly understood as a governance outcome produced by the interaction of geopolitical securitization, vertical decoupling within multi-level governance systems, and asymmetric resource dependence. By tracing how these mechanisms operate across policy design, institutional behavior, and resource allocation, this study explains why sustained learner interest has failed to translate into stable enrollment under politicized policy conditions.

These findings contribute to scholarship on education governance and cultural diplomacy by demonstrating how governance arrangements condition institutional capacity and shape market outcomes in international education.

#### **Teaching Quality and Curriculum Innovation: Institutional Capacity under Constraint**

Teaching quality and curriculum innovation are widely recognized by institutional actors as important factors shaping enrollment performance. Interviewees consistently emphasized the need for diversified programs, multi-level learning pathways, and pedagogical innovation to attract and retain students.

However, the findings of this study indicate that institutional capacity to improve teaching quality is structurally constrained rather than merely underdeveloped. Efforts to enhance curricula, invest in professional development, or expand program offerings remain heavily dependent on external policy instruments, including funding allocations, teacher mobility schemes, and scholarship quotas. Under conditions of policy uncertainty and fragmented governance support, institutions tend to prioritize short-term operational stability over long-term pedagogical investment.

From a governance perspective, this pattern reflects the consequences of vertical decoupling. Institutions are expected to innovate and improve educational quality yet lack the discretionary resources and policy autonomy necessary to do so. As a result, teaching quality becomes a dependent variable shaped by governance arrangements rather than an independent driver of enrollment outcomes.

#### **Policy Support and Resource Allocation: Structural Asymmetries**

The empirical findings underscore the decisive role of policy support and resource allocation in shaping enrollment trajectories. Survey data show that enrollment decline has been most pronounced in regions characterized by heightened political sensitivity and weaker policy backing, particularly in parts of Europe, Africa, and other non-Chinese-speaking contexts.

Rather than reflecting weak institutional performance, these regional disparities point to structural asymmetries in governance attention and resource distribution. Enrollment stability in certain parts of Asia and North America appears less associated with institutional competitiveness than with sustained policy support and relatively favorable diplomatic environments.

This uneven pattern highlights a core governance dilemma. Concentrated allocation of policy resources may generate short-term visibility and risk containment in politically prioritized regions, but it simultaneously undermines system-wide resilience. Institutions operating outside policy-favored zones face persistent disadvantages that cannot be compensated for through market mechanisms or institutional effort alone.

## Governance Fragmentation and Vertical Decoupling

Governance fragmentation emerges as a central explanatory factor linking policy design to institutional outcomes. Interviews with education officials and institutional leaders confirm that enrollment performance is increasingly shaped by political and diplomatic dynamics, particularly in contexts where geopolitical relations have disrupted local partnerships and recruitment channels.

At the same time, the findings reveal a pronounced vertical decoupling between governance levels. While central authorities continue to frame international Chinese language education as an instrument of international engagement and cultural diplomacy, implementing institutions confront immediate pressures related to funding stability, regulatory compliance, reputational risk, and student demand. This form of fragmented implementation reflects classic tensions identified in multi-level governance research, where policy coherence is undermined by the dispersion of authority and responsibility across levels and sectors [19, 27].

Consistent with multi-level governance theory, responsibility for managing uncertainty is increasingly devolved to institutions, while strategic discretion over policy instruments remains centralized. This configuration produces implementation gaps and constrains institutional adaptability, directly contributing to enrollment stagnation and program contraction.

## Market Pressures, Digitalization, and Resource Dependence

Market competition and shifting learner preferences further intensify enrollment pressures, yet the findings suggest that institutional responses to these pressures are conditioned by resource dependence rather than market logic alone. Most institutions continue to rely on traditional recruitment channels, while investment in digital marketing systems and online teaching platforms remains limited.

Private institutions are particularly vulnerable in this regard. Limited access to public funding restricts their capacity to invest in digital infrastructure, data-driven recruitment, and long-term brand development. This pattern aligns closely with resource dependence theory, which predicts that organizations lacking stable external support are less able to pursue innovation and are more exposed to environmental shocks. Consistent with resource dependence theory, limited access to stable funding constrains institutional capacity for digital innovation and long-term strategic investment, even in competitive education markets [15, 22].

Crucially, the digitalization gap observed in this study is not primarily technological. Instead, it reflects governance and resource constraints that render digital initiatives fragmented, short-lived, and difficult to scale.

## Integrative Discussion: Enrollment Decline as a Governance Outcome

The argument advanced here does not require demonstrating uniformly high or stable learner demand across contexts. Instead, it shows that enrollment outcomes vary systematically with governance conditions: institutions operating in less politicized and more stable policy environments experienced significantly smaller declines, despite comparable pedagogical offerings. This pattern suggests that governance arrangements, rather than market demand alone, condition enrollment trajectories. Taken together, the findings demonstrate that enrollment challenges in international Chinese language education are best understood as governance outcomes produced by the interaction of institutional constraints and politicized policy environments. Internally, institutions face limited strategic autonomy, standardized curricula, and constrained capacity for innovation. Externally, they operate under conditions of uneven policy support, fragmented governance coordination, and fluctuating political acceptance.

Most critically, vertical decoupling and asymmetric resource dependence create structural barriers that cannot be resolved through institutional effort or market responsiveness alone. Even where learner interest remains strong, governance arrangements shape how institutions perceive risk, allocate resources, and design programs, thereby conditioning enrollment trajectories.

By integrating multi-level governance, securitization theory, and resource dependence perspectives, this study moves beyond descriptive accounts of program closures or enrollment decline. It provides a mechanism-based explanation of how education policies fail under conditions of politicization and fragmented governance.

## Policy Implications

The findings generate several policy implications for international language education governance.

First, centralized policy ambition without sufficient decentralized adaptive capacity is unlikely to be sustainable. Limited institutional discretion over resources and program design increases sensitivity to political and regulatory fluctuations in enrollment outcomes.

Second, fragmented governance across education, cultural, and foreign affairs domains weakens policy coherence. In the absence of effective horizontal coordination, policy instruments operate in isolation and reduce overall policy effectiveness.

Third, asymmetric resource dependence incentivizes political compliance over responsiveness to learner demand, contributing to curriculum homogenization and reduced institutional differentiation.

Collectively, these findings suggest that governance architecture designed primarily for strategic visibility or diplomatic signaling may constrain institutional resilience when they fail to accommodate local adaptation and demand heterogeneity.

## Conclusion

### Summary of Findings

Building on the argument advanced in the Introduction, this article has demonstrated that enrollment decline in international language education is best understood as a manifestation of education policy failure under conditions of geopolitical contestation, rather than as a consequence of market dynamics or institutional inadequacy. Drawing on the case of overseas Chinese language education, the analysis shows that enrollment contraction emerges from the interaction between geopolitical securitization, fragmented multi-level governance, and asymmetric resource dependence. Across diverse regional contexts, institutions face declining enrollment not because of diminished learner interest, but because policy environments increasingly constrain institutional autonomy, destabilize resource flows, and weaken the translation of central policy objectives into sustainable educational practice. In this sense, enrollment decline functions as a governance outcome an indicator of systemic misalignment between policy design, governance coordination, and institutional capacity in politicized international education settings.

Empirically, the study shows that this governance failure is not attributable to a single policy deficit, but to the cumulative effects of misalignment across governance levels. Enrollment decline is most acute in contexts where geopolitical securitization intensifies institutional risk aversion, where coordination among education, cultural, and foreign affairs authorities remain fragmented, and where institutions are structurally dependent on centralized policy instruments such as subsidies, scholarships, and teacher mobility schemes. Survey and interview evidence indicates that these conditions constrain institutional discretion over program design, recruitment strategies, and long-term planning, thereby weakening institutional capacity to respond to sustained learner interest. Rather than reflecting weak institutional performance, declining enrollment thus signals the failure of existing governance arrangements to

reconcile diplomatic objectives with the operational realities of international language education.

Most importantly, enrollment challenges arise from the interaction of internal institutional constraints and external policy environments, rather than from market demand alone.

### Theoretical Contributions

This study contributes to the education policy and governance of literature in three ways.

First, it advances research on international education governance by shifting the explanatory focus from market-based accounts of enrollment change to governance-centered mechanisms. While existing studies emphasize competition, institutional strategy, or pedagogical quality, this study demonstrates that enrollment dynamics are more systematically shaped by governance structures, particularly securitization, vertical decoupling, and asymmetric resource dependence. In doing so, it repositions enrollment decline as a governance outcome rather than a market adjustment process.

Second, the study develops a mechanism-based account of institutional adaptation under multi-level governance constraints. By identifying differentiated adaptive strategies including path-dependent continuity, partial digital adaptation, and institutionally constrained lock-in it shows how institutions respond to supply-demand misalignment not through optimization, but through structurally bounded forms of adjustment. This contributes to a more fine-grained understanding of how governance arrangements shape institutional behavior in international education systems.

Third, the study extends scholarship on perception and legitimacy in education governance by demonstrating how enrollment outcomes are mediated through reputational sensitivity, informational uncertainty, and policy-induced risk environments. Rather than treating demand as purely economically rational, the analysis highlights how perception-based mechanisms and legitimacy dynamics condition institutional visibility and student decision-making processes.

Taken together, these contributions suggest that international education outcomes are best understood as the product of governance-conditioned mechanisms operating across policy design, institutional behavior, and perception structures, rather than as simple responses to market forces or institutional capacity.

### Directions for Future Research

This study has several limitations. The sample does not capture the full diversity of global Chinese language education contexts, and the analysis focuses primarily on institutional perspectives.

Future research could conduct comparative studies across different national policy regimes, examine how securitization and politicization reshape education governance, and explore the long-term effects of digital education models on enrollment dynamics and policy implementation.

Beyond the case of International Chinese language education, the article speaks to broader debates on how education policies fail under conditions of politicization and fragmented governance.

**Conflicts of Interest:** The authors declare no conflicts of interest.

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