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SOCIOLOGY | RESEARCH ARTICLE

Institutional and policy-related implications on quality education access in Shanghai: Middle-class locals, outsiders and foreigners compared

Arianna Ponzini¹

Abstract: This article examines China's national education system focusing on the city of Shanghai, in order to evaluate the school-related institutional constraints and opportunities of three major institutional categories: locals, Chinese outsiders and foreign expatriates. The study sheds light on the generated and perceived education-related inequality of each category and is aimed at stimulating reflection and discussion on a more inclusive education system. The empirical findings hereby presented are the result of qualitative research, which highlights a pattern in the educational evaluations of the different groups: the farther the geographical (and institutional) identity, the stronger the tendency to select private or international schools. This argument quite naturally spurs from institutional policies, which tend to favor locals as receivers of national education. The article is divided into three main sections: key educational policy elements for the city of Shanghai; institutional constraints and advantages for each of the aforementioned categories; school offer in Shanghai, as well as main research findings related to institutional frame, limitations, primary options and decisive factors related to the educational decisions of locals, outsiders and foreigners compared.

Subjects: Social Sciences; Education - Social Sciences; Sociology & Social Policy;

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PUBLIC INTEREST STATEMENT

Middle-class parents in China are ever more valuing education and are willing to do anything in their power to secure the best education opportunities for their children. However, China's education system is exclusive and the inequality generated by the national education system is very well perceived by families. This article takes into examination the education-related constraints and opportunities of three major social categories in contemporary China: Chinese locals, Chinese outsiders and foreign expatriates, focusing on primary and secondary education. The article alternates theoretical analysis and empirical findings, which are the result of qualitative research and extensive interviews with the members of 35 families residing in Shanghai. The article shows how locals are favored as receivers of national education and sheds light on the nature of education inequality as well as on its implications on Chinese families' education-related choices.

Keywords: contemporary China; Chinese education; hukou; Chinese middle class; foreign expatriates in China

1. Introduction

Access to quality education is paramount in the eyes of Chinese parents, who are willing to do anything in their power to grant their child the best education opportunities. Especially for the new urban Chinese middle class, securing quality education is a strategic stepping-stone to achieving strong cultural capital (Bourdieu, 1984) and, consequently, social advancement as well as social reproduction opportunities (Ponzini 2020a).

Access to quality education in China is widely regulated by often intertwined policy as well as institutional guidelines (namely, the *hukou* system, illustrated later on in the article), which generate mechanisms of inclusion and exclusion from local social and welfare systems. Such mechanisms create a *de facto* categorization of individuals residing in a given place into two major categories: “insiders” and “outsiders”, in Chinese referred to as *tizhineiren* and *tizhiwairen*, a categorization that has been undergoing significant changes throughout China’s social history.¹

The presence of such regulations has affected education-related opportunities of distinct social groups, which share different degrees of “inclusion” or “exclusion” as pertains the access to China’s national education system in their place of residency. In particular, this article examines as primary subjects of analysis three groups (defined by institutional identity) that are particularly relevant for a study of this nature. Chinese locals (*tizhineiren*, i.e. those who enjoy full institutional advantages, “insiders”), Chinese “outsiders” (*tizhiwairen*, i.e. those who possess a non-local *hukou* and, therefore, are subject to institutional limitations and constraints) and foreigners (also *tizhiwairen* who, differently from the outsiders, do not possess a *hukou* and enjoy different sets of institutional limitations and advantages).

Hence, the *hukou* system combined with national and local policy regulations provide a useful framework for analyzing levels and perceptions of inclusivity as pertains China’s national education system, which is exclusive and unequal (Feng & Lu, 2013) in terms of academic resource allocation and opportunities.

Policies of various nature, enforced in Shanghai by the Shanghai Education Bureau, provide strict guidelines for school admission criteria and required documents, with the aim of effectively managing school enrollment processes while ensuring that national education maintains its quality as well as affordability. Relevant policies (Qian & Walker, 2015) determine that public schools are, in fact, potentially free for Chinese citizens (who merely pay schoolbook fees), but not so for foreigners, who are required to pay a reasonable tuition fee to be admitted.

China’s education policies are able to reach multiple spheres of the family life of those residing in Shanghai. Two of these are exemplary. First, the so-called “tenant discrimination policy”, which determines that homeowners are ranked above renters in school admission processes (Ponzini 2020a). Second, China’s “neighborhood school policy” (Feng & Lu, 2013; Shanghai Education Bureau), which basically assigns specific schools to specific neighborhoods and residential units, indirectly affects families’ strategies also in terms of housing, lifestyle and ideas of status (Ponzini 2020a).

A key institutional element in this analysis is China’s special household registration system, known as the *hukou* system, which practically limits outsiders’ access to resources and benefits (including public education) in a place that is not that of original residency (Fan, 2008). This means that

although non-local *hukou* holders can be enrolled in the public school system, this category of residents faces related challenges and limitations, which will be illustrated further along in the article.

Much has been published on the Chinese national education system as well as on the significance of educating the Chinese youth (Gu et al., 2018; Price, 2017; Tan, 2015, 2019). Many of these studies deal with *hukou*-related inequality (Feng & Lu, 2013; Goodburn, 2009; Qian & Walker, 2015) along with the topics of academic performance and of China's score-centered system (Tan, 2019). Other studies have looked at the relationship between education and housing. Feng and Lu (2013) and Zhang and Jie (2017) have analyzed the correlation between quality schools and housing prices in Shanghai, while further studies have analysed the inequality in terms of educational opportunities between homeowners and tenants in Shanghai (Zhang & Jie, 2017).

This article builds on this body of literature and its aim is twofold. 1) Provide comprehensive understanding on education-related policies and institutional constraints that affect the quality education access of distinct institutional groups residing in Shanghai and 2) Investigate the said institutional groups' perceptions and opportunities in terms of access to quality education.

Shedding light on the effects of policies and institutional regulations on quality education access of major social categories (insiders and outsiders), combined with first-hand qualitative interviews, is significant in the way that it stimulates reflection and discussion on the generated and perceived education-related inequality of different institutional groups, with the aim of considering an implementation of more inclusive education policies.

The main finding and, therefore, the argument made in this article is that school-related opportunities and preferences widely reflect the geographical—and institutional—connotations associated with locals, outsiders and foreigners: the farther the geographical (and institutional) identity, the stronger the tendency to select private or international schools. This argument quite naturally spurs from institutional and policy-related constraints, which tend to favor locals as receivers of national education.

2. Methods

The findings presented in this study are the result of a qualitative investigation which privileged an ethnographic approach. 35 in-depth qualitative semi-structured interviews were conducted in the city of Shanghai in 2019, over a total fieldwork time of two months, with middle-class residents² belonging to the above-mentioned three institutional categories of: local *hukou* holders, non-local *hukou* holders (outsiders), and foreigners (EU, UK and US nationals). Hence, the “foreigners” category is merely representative of Westerners' perceptions and aspirations on quality education in China, which may differ from other nationality groups.

The number of interviews was not pre-arranged, but determined by the reach of the data saturation point. All of the families belonged to the middle class (Goodman, 2014; Ying, 2016b) and had a child in the age range of kindergarten to middle school.

The field site was the city of Shanghai, which geographically focuses the study on the city's local system. The selection of this specific field site owed to two main factors: firstly, the necessity to narrow down the research field through a geographical lens in order to be able to carry out in-depth interviews; secondly, policies in China are interpreted and implemented at a local level and, therefore, local policies may differ throughout different cities. Hence the decision to focus on a major city as a case study, also in order to be able to conduct a comprehensive examination of local policies and institutional regulations.

With the aim of collecting rich and relevant data, the main research method applied was grounded theory, which provides a methodology that allows the concerns of the social participants to emerge in context (Charmaz, 2006) and is thus useful for research of a social nature. It

was important to identify a methodology that was not fully pre-framed and which enabled data to emerge without being predefined by a theory, a research paradigm, or the researcher herself. Grounded theory is an inductive methodology that looks for patterns within the data in order to explain the research question and generate theory. The methodology does not attempt to understand social phenomena as the individual participants in that social phenomena view it; rather, it uncovers systematic patterns in their experiences (Charmaz, 2006). The *modus operandi* of grounded theory entails asking individuals about their own experiences in a given social context and, subsequently, uncovering patterns that participants might not even be aware of. It is clear how data becomes the focus of analysis in such a methodology; the data is analyzed to illuminate patterns and social processes that answer the research questions. As such, it is a methodology that develops data from simple description through conceptualization in order to explain the social phenomena in question. It is, therefore, a practical pattern-finding method that limits interpretation through an *a priori* theoretical framework or the subjective interpretation of the researcher (K Charmaz, 2006). Because of these features, grounded theory methodology is useful in addressing the critique that empirical inquiry is descriptive and inferior to philosophically driven inquiry, or that empirical inquiry is theoretically bound within preconceived ideas about the phenomena, either through the lens of the research framework or the researcher (Charmaz, 2006). It is a methodology that is not used to test or reaffirm existing theory, and it is useful when little is known about a social phenomenon and/or to provide a fresh slant on current knowledge.

A variety of data collection strategies were applied. Along with face-to-face formal interviews, both in individual and group settings, were other more informal means of data collection, such as guided conversations in informal settings, e-mail exchanges, video-calls and voice-messages. The approach of combining formal and informal means of data collection was valuable in view of the goal of obtaining meaningful and personal data, an objective which is harder to achieve when merely relying on formal interviews and meetings.

Matters of ethical concern have been given full attention and have been dealt with through dedicated ethical forms that have been approved by the researcher and each of the participants, which have gladly given their consent for their experiences and ideas to be integrated in this research study. No under-age individuals have been interviewed for the purpose of this article. Ultimately, the empirical section in this article avails of pseudonyms to protect the privacy of the participants and does not disclose any personal details or information that may lead to a violation of the participants' privacy.

Major topics for discussion covered in the interviews included:

- (1)) China's national education system
- (2)) Perceptions and experiences of the *hukou* system
- (3)) Education ideas and aspirations
- (4)) Key schools
- (5)) Public vs private schools
- (6)) International schools
- (7)) Education plans and reasoning behind education strategies

Ultimately, to analyze the data, all of the audio-recordings and field notes have been transcribed, subsequently grouping the data into core categories, common categories and lower level concepts. This process allowed for an organization of the findings in preparation for theory building as well as for the development of a theoretical framework, and for identification of the central frames around which the empirical section of the article is built.

The article is organized as follows. The first section presents key policy elements for analysis of the Chinese national education system, specifically focusing on the city of Shanghai. The second section explores institutional, *hukou*-related challenges for outsiders in public school access as well as potential limitations for foreign expatriates. Finally, the last section presents a picture of the school-related offer in the city of Shanghai, and illustrates the main research findings related to institutional frame, institutional limitations, preferences and decisive factors related to the educational decisions for each of the three groups.

3. Government policies for the development of national education: Shanghai as a case study

The paramount importance of education in China has in many ways been encouraged by government policy. During the initial stages of economic reform, Deng Xiaoping thought of education as the foundation for the “Four Modernizations”: agriculture, industry, national defense, and science and technology. This theory was followed in 1983 by the theory of the “Three Orientations”, which, according to Deng, meant that the education system “must be oriented to modernization, to the world and to the future” (Feng & Lu, 2013). That year, the Central Committee of the Chinese Communist Party and the State Council presented the Outline of Education Reform and Development in China, stating that “a strong nation lies in its education and a strong education system lies in its teachers”. Fourteen years later, in 1997, the 15th National Congress of the Communist Party established that the core development strategy of the country would be the promotion of science and education. In 2004, a five-year plan (2003–2007) entitled “The Action Plan for Invigorating Education” was promulgated by the State Council, with education placed as the top priority for the development of a modern China (Feng & Lu, 2013). Such a system, however, is not unique to China; similar systems exist in Western societies as well, e.g., the United Kingdom.

According to preliminary statistics released by the Ministry of Education of China in 2017, China spent nearly 3.9 trillion RMB on education in 2016, an increase of 7.57 percent from 2015. As a final example of the government’s policy commitment to education, in 2010, the Ministry of Education issued the Outline of China’s National Plan for Medium and Long-term Education Reform and Development (2010–2020), with the aim of making China a country based on knowledge and technology. This plan was enacted with the specific goal of tackling the deficits of an educational system which is strongly test-focused, such as a lack of critical thinking, creativity and problem-solving skills (Feng & Lu, 2013).

In the city of Shanghai, the education system and the housing market have both drastically changed since the 1990s. A crucial year was 1997, when entrance examinations for junior high school were substituted for by the neighborhood school policy, leading to a neighborhood-based school admission system (Feng & Lu, 2013). The neighborhood school policy and its strict enrolment regulations have the purpose of maintaining public schools (*gongli xuexiao*) in Shanghai potentially free, with no explicit tuition fees to be charged. This new policy has thus created a close link between the housing market and good schools, which allows Chinese youth to pursue quality education. During these years of education and market reforms, private schools started to flourish, and some of the best primary and secondary schools were partially privatized (Feng & Lu, 2013). Private schools are known in China as *minban xuexiao*, or “schools run by the people”. Parallel to the educational system reforms, the public housing system gradually transformed into a private system: in today’s China, housing is less frequently included in companies’ welfare benefits, and the majority of Chinese individuals purchase and sell their homes on the market. Therefore, starting from the 1990s, people have been potentially able to choose their child’s school by purchasing an apartment located in the neighborhood of that school.

Since 2003, the Chinese government has started to reconsider such a market-structured education system, which is a cause of inequality in educational opportunity, and has attempted to strengthen the “neighborhood school” system in order to try to promote educational equality. Since 2005, academic competitions at the primary school level, an important tool for selecting students based

on ability, have been forbidden in every province. In 2006, the Shanghai Municipal Commission on Education (SMCE) disallowed public schools from enrolling students based on tests and prohibited private schools from meeting students prior to enrolment. In 2007, the Shanghai government further regulated the private schools' attempt to enroll students across districts (Feng & Lu, 2013). Despite the attempts made by the Chinese government to reinforce the neighborhood school policy, school choice through housing cannot be controlled and is still a widespread phenomenon. This is because parents are in effect able to choose a school for their children by choosing their neighborhood of residence. Therefore, a reinforcement of the "neighborhood school" system has, consequently, strengthened the relationship between housing prices, educational access and school quality.

The Chinese education system follows the 6–3–3–3/4 model (6-year primary school, 3-year junior middle school, 3-year senior middle school/vocational school, and either 2- or 3-year college or 4-year university). Attending 9 years of schooling (6-year primary school and 3-year junior middle school) is obligatory for all children under the Compulsory Education Law (1986, 2006). The key stage for Chinese students is junior middle school, in the final year of which students find themselves sitting the *zhongkao*, or "high school entrance examination" and competing for limited places in senior middle schools, one of the few possible routes to entering a key university. As of 2018, the percentage of students in Shanghai admitted to senior middle schools is around 60% (this datum does not include vocational schools, but only considers academic education and qualifications), with a privileged track for students of public schools as opposed to private schools in cases of equal test scores.

The traditional education system in China is "exclusive", mainly due to the existence of the so-called "key" schools at different geographical levels. Key schools enjoy the best educational resources and admit students based on entrance examinations. The key school system was suspended during the Cultural Revolution, only to reappear in the late 1970s (Feng & Lu, 2013). Owing to a lack of educational resources and teachers, selected "key" schools were prioritized in the assignment of teachers, equipment and funds. Key schools are far fewer than regular schools and allow the best students to be admitted to the best secondary schools based on entrance scores. The Chinese educational model is hierarchical, with priority in resource allocation given to key schools, which are intended for talent training and have a demonstrative as well as an experimental role.

The city of Shanghai selected its first key schools in the 1950s and followed the key school system until 1994, when the neighborhood policy was introduced. However, after that year, the key school system was only formally abolished, since the list of key schools is still well impressed in Shanghai parents' minds. Therefore, distinction among schools is still present, and the term "key school" is still commonly used to identify high-quality schools, proving that a hierarchy of schools still exists. What are considered as top schools in Shanghai are either expensive—such as international private schools—or elite public schools (the former key schools). Following in the ranking are the former regular schools, which enroll a large number of migrant children and working-class family local children; local private schools and, at the very bottom, are migrant schools. Nevertheless, since 2010, many migrant schools have been gradually improving their facilities thanks to government funding (Shanghai Education Commission, 2012).

Furthermore, between 2005 and 2007, fifty quality schools were designated in Shanghai as "Shanghai Experimental Model Senior High Schools" (Feng & Lu, 2013). However, since there was no official disclosure of schools' quality rankings in the past, information regarding school quality is still imperfect in Shanghai. The designation of schools as Experimental Model Senior High Schools, which occurred in several waves, has disclosed information on school quality distinction, which has increased enrolment competition for these top schools and caused a disequilibrium in terms of housing prices in districts where the best schools are located.

4. Institutional challenges for public school access: outsiders and foreigners

As described above, admission to schools in China is largely governed by the neighborhood school policy, which is based on the parents' *hukou*, or residential status. In fact, if parents do not possess a local *hukou*, their children can attend nearby quality public schools only until middle school, and therefore are formally left with the options of a migrant school or a private school for high school education. A local *hukou* can be obtained, but meeting the requirements for application is far from being an easy goal: similarly to other Chinese cities, Shanghai has introduced an experimental point-based *hukou* system. This system allows outsiders to apply for a local *hukou* once a score of 120 points is reached. The evaluation criteria include a mixture of indicators decided at the provincial and city levels, such as participation in social security funds, contribution to society and the employment and tax situation of individuals (Zhang, 2012). Education, employment and homeownership also play a pivotal role in the process of point accumulation, as Shanghai's policy towards outsiders is the attraction of "talents" into the city (Franceschini, 2011).

Therefore, institutional regulations still act as an obstacle to the admission of non-local children in Shanghai's public school system; hence, most Chinese non-local families feel the pressure to apply for a *hukou* conversion before their child starts school. This owes to the fact that schools in China are subject to path dependency: a good primary school leads to a good middle school, a good middle school leads to a good high school, and so on (Ponzini 2020a).

Various initiatives have been implemented in Shanghai since the 2000s to improve educational opportunities for non-local children. In fact, before the year 2000, non-local children had to pay high extra fees (*jiedu fei*) in order to be able to attend a public school (a nearly prohibitive choice for poorer migrants) or else enroll their children in private schools or migrant schools, (*mingong xuexiao*) where the quality of education is low and facilities are basic (C Goodburn, 2009).

However, in 2001 the State Council issued a notice which urged local governments to provide public school education for all children, local and migrant. This notice was based on two claims (*liang wei zhu*): "the education of migrant children is mainly the responsibility of the recipient city" and "migrant children should be educated mainly in public schools". Subsequent to this notice, many cities responded by taking action to deal with the struggles of migrant children, including Shanghai. Shanghai enacted three main actions to confront the obstacles originating in the *hukou* system and to include migrant children in the public education system (Qian & Walker, 2015).

In 2004, Shanghai's local government issued a policy entitled "Suggestions on Enrolment of Primary and Junior Secondary Schools" (Shanghai Education Commission, 2004), which encouraged public schools to expand their capacity to enroll migrant children, for example, by expanding class size in order to offer more places to migrant children. The 2007 version of the directive directly encourages local districts to expand the ratio of migrant children admitted in public schools.

The second action occurred in 2008, when a new initiative entitled the "Three-Year Action Plan" (2008–2010) for the Compulsory Education of Migrant Children was put forward by the Shanghai government (Shanghai Education Commission, 2008a). During this period, the local government invested a large sum to build 144 new schools, which consequently increased school places for children (Zhang & Jie, 2017). Furthermore, the Action Plan encouraged schools located in migrant communities to expand class size from 40 to 50 places (Shanghai Education Commission, 2008a). In addition, a new policy was enacted in the same year to reduce the paperwork (a total of eight documents: identification card, temporary residence permit, employment permit, health certificate of the parent, population planning certificate, social insurance certificate, guardianship certificate or birth certificate, and the health certificate of the child) and financial requirements for migrant children wanting to attend a public school (C Goodburn, 2009). The documentation was reduced to two certificates: the parents' rural ID certificate and the temporary residence permit, and the extra fee was eliminated.

The third action involved district governments signing contracts with migrant schools to enroll migrant children in districts where public schools had limited places (Shanghai Education Commission, 2004, 2008a). The government would offer sufficient funds to provide free education in migrant schools as well as in public schools. By 2010, 162 migrant schools had received public funds and provided free education for migrant children.

Data shows that these policies have been successful (Zhang 2012). According to the latest official data, in 2012, 74.72% of migrant children receiving compulsory education in Shanghai were enrolled in public schools, with 25.28% attending government-authorized migrant schools (Shanghai Education Commission, 2012).

Furthermore, the new credit-based residence system was introduced in 2013 in Shanghai (Shanghai Municipal Government, 2013). As seen earlier in the article, this system allows migrants who have long-term residences and stable jobs to gain points towards their applications for a Shanghai *hukou*. The first district to implement this new policy was Fengxian. Following the new regulations, non-local children currently need six certificates to gain basic credits (up to 100 points): the parents' employment certificate, a temporary residence permit that has been effective for at least one year, the child's residence permit, a vaccination certification, a birth certificate, and a household register that proves the parenting relationships. Parents get extra credits (up to 80 points) if they can provide additional documents such as the only child certificate or formal degree certificates. Students are enrolled based on the credits each of them receive; those who cannot submit the six documents are not offered a place (Qian & Walker, 2015).

However, in spite of the enacted measures, non-local *hukou* holders or outsiders are still facing important institutional as well as policy-derived restrictions in relation to public school access. As for foreigners, the interviews carried out for this research show that this group, albeit not sharing the benefits of local residents, is potentially subject to fewer limitations than Chinese outsiders. In fact, participants stated that Chinese schools are required by law to accept the children of all legal foreign residents. Ultimately, an increasing number of public schools is opening "international divisions" aimed at welcoming students with foreign nationalities and, therefore, subject to potential language as well as institutional barriers.

5. Shanghai school types and distribution of public key schools

When a child comes of school age in China, there are potentially multiple school options to choose from, primarily: public schools (key or regular), local private schools and international private schools.³ Migrant schools are not hereby listed, as they are not contemplated as an option by middle-class families.⁴ In the eyes of Chinese parents, the differences in quality among these schools are evident: there is still a strong hierarchical conception of schools, in terms of both quality and prestige, especially in metropolitan cities like Shanghai.

Overall, interviews confirm that the majority of Chinese families still aim for public schools, which offer a traditional national curriculum fully oriented towards a high performance in the national university entry examination, or *gaokao*. Nevertheless, public schools are not all the same, and the former "key" schools are still perceived to have higher prestige and quality:

"Key schools have a more student-focused educational system (*you zhenduixing*), better teaching and educational resources, and usually offer international exchange programs (for example, summer schools in English-speaking countries)." (Mrs. Shi)

In Shanghai especially, the term "key school" is still widely used, and families often do anything it takes to enroll their child in a key school, including relying on their *guanxi* (connections). In fact, policy regulations have contributed to making the national education system in China extremely competitive. Currently, Shanghai has a total of 108 former key schools, distributed among its districts as represented by the author in the map below (Image 1)⁵:

Image 1

Owing to the neighborhood school policy enforced in Shanghai, neighborhoods with key schools tend to be more expensive, nevertheless purchasing a house in these neighborhoods is a very desirable goal for Chinese middle-class families (Ponzini 2020a). Ultimately, as mentioned earlier in the article, an increasing number of public schools have opened an “international division” aimed at students with foreign nationalities, who may encounter language barriers in school enrollment processes and attendance. By law, public schools in China are required to admit children of all legal foreign nationals, subject to payment of a reasonable tuition fee (Ministry of Education).

Although—as confirmed by qualitative research—the most popular option for Chinese families remains public schools (if not key, then regular), private schools are nevertheless gaining ground, especially those schools which offer an alternative and a more “international” curriculum: in 2004, 3.2 million students studied at private primary schools in China, representing 2.9% of all Chinese primary students. By 2012, those numbers had grown to 5.9 million and 6.2%, respectively. Similarly, the number of students studying at private high schools and middle schools grew by 27% and 43%, respectively, during the same time period (Ministry of Education, 2018).

Even though private schools are not the most popular option for local Chinese parents (preferences will be illustrated in the next section), their quality is nevertheless steadily improving: current private schools are generally well run and attract top teachers and principals, due to the fact that they are meant to educate the urban elite. Furthermore, private schools with international curricula are becoming increasingly popular with urban parents due to their Western-style educational system, which sacrifices rote-memorization in favor of critical thinking and creativity. Fieldwork showed that a common opinion among Chinese educators is that students coming from middle- or upper-class families opt for private or international schools to avoid the pressures on their children from the *gaokao* examination. However, an increasing number of wealthy-background students with strong academic performance are also applying to enroll in private schools with international curricula, which is potentially a stepping-stone to enter a prestigious foreign university. Educated, middle-class parents value cultural capital (Bourdieu, 1984) as a means for their children to achieve middle-class reproduction of the family (Ponzini 2020a). Therefore, middle class parents’ ambitions are not limited to having children who are good at taking exams; they instead aim at giving their children a well-rounded education that develops their critical and creative thinking skills, as well as their English language skills, all of which are essential in order to become a learned, well-traveled and independent individual. Owing to high tuition fees, which are over 100,000 RMB/year, private schools are not accessible to every family, and those who can afford them often opt for the “safer” and familiar option of public schools, with the idea of giving their children a well-rounded education through travel and studying-abroad programs later on, as confirmed by qualitative research.

As for parents who wish to enroll their children in a Chinese traditional curriculum, choosing a private school may not always be the best option: although their reputation is improving, private schools still occupy a disadvantaged position in terms of the *zhongkao* and *gaokao*. In fact, one of the participants (a local *hukou* holder) shared her view:

“According to the latest regulations for the city of Shanghai, in case of an equal score, students from public schools are ranked higher than those from private schools. Therefore, parents who intend to give their children a more ‘traditional’ Chinese education aimed at achieving the best performance on the *gaokao* tend to prefer public schools”. (Mrs Shi)

Finally, as in the case of private schools, international curricula are, of course, offered by private international schools. Fieldwork research conducted on the international schools located in the city confirms that Shanghai has one of the largest concentrations of international schools in China, a total of 39 schools, most of which follow the International Baccalaureate (IB) curriculum or the

curriculum taught in their respective home countries. The range of international schools in Shanghai is diverse, with students from different backgrounds attending them. As with local private schools, tuition fees for international schools are very high (over 150,000 RMB/year) and are tailored to elite wealthy families. International schools claim they have very high educational standards, and they practice strict admissions policies, with some international schools only accepting children with foreign passports.

As an example of education-related policy implications on local schools, below are the admission eligibility requirements of Wellington College International Shanghai, one of the renowned international private schools of the city. As stated in their enrollment guidelines, which draw from the policies enforced by the Shanghai Education Bureau, the College is able to accept a variety of families due to a variety of criteria for admission, organized into four categories:

- Type A. Working parent is a foreign national with a Shanghai work permit
- Type B. Working parent is a PRC national working in Shanghai and the child is born overseas (B1) or the child is born in Hong Kong SAR, China or Macau SAR, China or Taiwan, Province of China (B2)
- Type C. Working parent holds a passport from Hong Kong SAR, China or Macau SAR, China or Taiwan, Province of China
- Type D. SHMEC waiver letter holders

Therefore, most families residing in Shanghai are able to consider applying for this school or other international schools, which share similar guidelines in line with municipal policies.

At the bottom of the school-type ranking are migrant schools, which are not considered as an option for middle-class families: although, as mentioned earlier in the article, their education quality and facilities have been improving thanks to local government funds (Goodburn, 2009), migrant schools still represent the least desirable option for non-local residents. It is common in poorer schools for classes to be very big and to lack facilities and qualified teachers. Apart from regular migrant schools, there are also recreational migrant schools, which offer classes in music, dance, sports and other extra-school activities for migrant children.

6. Education-related limitations and opportunities perceived by locals, outsiders and foreigners. Findings and discussion

The discussion above shows that Shanghai families, be them local, outsider or foreign, face education-related experiences which largely reflect their institutional identity, local policy regulations as well as personal financial considerations (for middle-class participants, the latter often deriving from institutional status). Each of the three categories faces related “inclusions” or “exclusions”, which constrain and drive different institutional subjects to implement diverse strategies as for access to quality education.

This final section presents empirical qualitative findings collected through fieldwork research conducted with the aim of investigating the institutional and policy-derived constraints for each of the three categories as regards access to quality education. Such empirical findings are significant in order to shed light on the limitations and opportunities shared by each institutional category of subjects in the acquisition of cultural capital and social advancement (Bourdieu, 1984; Ponzini 2020a; Ponzini 2020b) and provide empirical material which can aid policy-oriented discussion.

The presentation of data is organized in four distinct sections, which represent the “core categories” in which the same data was categorized in in the data analysis phase (see above Methods section): 1) institutional frame; 2) institutional limitations; 3) primary option; and 4) decisive factors. In the following subsection, the data is furthermore presented as grouped per

Table 1. Data presentation

	INSTITUTIONAL FRAME	INSTITUTIONAL LIMITATIONS	PRIMARY OPTION	DECISIVE FACTOR
LOCALS	Local <i>hukou</i>	None	Public school	National curriculum; free education
OUTSIDERS	Non-local <i>hukou</i>	Public school only up to middle school	Private school	<i>Hukou</i> -related constraints
FOREIGNERS	No <i>hukou</i>	None	International school	International education; English

institutional category in the sequence: locals, outsiders and foreigners, and by integrating the four-fold core category organization with direct qualitative interview excerpts to support the findings.

The institutional and policy frameworks illustrated serve as a theoretical contextualization of the following empirical analysis and of the fourfold categorization. Below is a schematic table with the main findings (Table 1):

6.1. Local residents (local *hukou* holders)

As far as the institutional frame, i.e. *hukou* registration status, local *hukou*-holders are by all accounts the most favored group in terms of access to benefits and quality education. Mr Zeng’s testimony confirmed the view of the other participants:

“As local *hukou* holders, we definitely enjoy the most benefits, no matter what social aspect we are talking about: work, healthcare, housing and so on. This is why many *waidiren* (outsiders) who move to Shanghai to work wish to apply for a *hukou* conversion: for the advantages and the benefits. But most of all, I think that *hukou* plays a huge role especially in education, which is very important in China and for all Chinese parents” (Mr Zeng)

His wife, Mrs Zeng, added to her husband’s thought:

“This is so true, especially in today’s society where most families only have one child: “little emperors” they call them, *xiao huangdi*. All families want to invest in their child’s education and competition for good schools is so fierce in Shanghai! So we are definitely lucky as local-*hukou* holders, because we have potential access to national education here in Shanghai and do not need to worry about high-school and other *hukou*-related issues (she refers to the fact that non-local *hukou* holders only have access to public schools in Shanghai until middle school, and are required to go back to their original place of residency should they wish to continue pursuing public education)” (Mrs Zeng)

Another *hukou*-related issue that affects access to quality education is that the possession of a local *hukou* also allows locals to be entitled to bank loans (generally not an option for outsiders) and, hence, to secure housing in strategic neighborhoods, i.e. know for a good school (Ponzini 2020a; Ponzini 2020b). Mr Wang, a non-local *hukou* holder employed in the high-end service industry, often expanded on the housing topic, as it was cause for major concern for him and his family:

“Owning a house is crucial, as it provides many privileges to homeowners, including a local *hukou* after 7 years. However, purchasing a house in Shanghai is a very difficult task, as prices are sky-high. I think that locals (*tizhineiren*) have much fewer issues, also due to the fact that they can easily access bank loans. Owning a house is crucial for our child’s education: we all want to send our children to key schools and to do that we need to purchase a house in that school’s neighborhood (he refers to the “tenant discrimination policy”, where renters rank below owners in school admission selections). Hence, I think that possessing a local *hukou* is really important for our child’s education: it’s much easier to secure the best opportunities.” (Mr Wang)

Mr Wang's testimony confirms the perception that homeowners are favored over renters in school enrollment processes: therefore, as the participants confirm, local-*hukou* holders share many benefits and advantages as opposed to outsiders. In fact, due to their advantageous institutional position, middle-class local families potentially face no related constraints or limitations in terms of access to quality national education.

In terms of school option and primary choice, the qualitative interviews show that local families can overall be divided into two core categories:

- (1)) The more traditional families wish for a Chinese education for their youth and ideally aim for public key schools
- (2)) More internationally-oriented families want to give their children an international and English language-oriented education, and therefore opt for international curricula in local or international private schools

"We wish to give our child an international education, starting early on in her academic career: this is why we have enrolled her in a private school (international curriculum). The English language is very important and we really hope our daughter will receive well-rounded training, so that she will grow up to be independent and think critically about life. The Chinese education system has many issues, the main one being the lack of training of creative and critical skills" (Mr Li)

However, the Li Family was a minority in their choice of opting for private education. Data show that the majority of families (over 80% of respondents) still prefers national education over international education. In fact, the majority of the local families interviewed believed in the quality of the national education system, although aware of its major downsides. These can overall be divided into three major categories: homework, rote memorization and bad use of teaching time, and strong competition, as Mrs Shi's testimony summarizes:

"National education is the best quality education option in China, especially key schools: everyone aims for key schools. But homework is too much, quite different from Western countries I believe. Also, parents are constantly asked to be involved in homework and in their child's school life in general: WeChat groups are impossible to deal with. The teachers and the schools expect parents (in China usually the mother) to study with their children (*peidu*). I am often so tired late at night when still monitoring my son's work that I nearly fall asleep beside him. This is also made difficult by the fact that the children's time in school with the teachers is not used properly: teachers spend much time on memorizing texts and poems in literature class (*yuwen ke*), but don't really train the children in active abilities, such as writing. So we parents are left to teach them those. You know, competition is really fierce in Shanghai, so of course we do the best we can and organize all sorts of extracurricular classes for our children. We all often feel overwhelmed: I just hope that my son's *zhongkao* (high-school entrance national examination) goes well, so that he can be proud and value all of this effort. It's really hard on the children." (Mrs. Shi)

However, in spite of the hardship, public schools are still preferred, also due to them being favored in rankings for school entrance examinations (see Mrs Shi's previous testimony), while providing free education.

Concerning the more traditional families, when asked whether they would consider an international education for their children, the families who responded favorably stated they would rather have their children pursue an international education by attending a foreign university in the future, or even by attending short-term summer camps abroad. This reply was mainly backed by two concerns, as Mr Mao explained during an interview:

"We do encourage our child to seek an international environment, but we hope that this happens later on, possibly after he starts university. We fear that if we send him abroad early on in life, he will neglect Chinese values and will grow up differently from us and his

family. Another practical issue is that attending international schools may entail study periods abroad. In this case, many Chinese mothers prefer moving with their child and my wife is definitely not willing to move country (due to adaptability issues) for the sake of securing an international education.” (Mr. Mao)

Other responses also included economic and financial considerations when weighing school-related options, thereby preferring the public option.

6.2. Outsiders (non-local *hukou* holders)

As discussed earlier in the article and in the previous subsection (see Mr. Zeng and Mr. Wang’s testimonies), outsiders do not enjoy the same benefits as locals, even when sharing a similar class status. Access to public schooling can present constraints for this category: in fact, as Mrs. Zeng confirmed, non-local *hukou* holders can be admitted to the national education system only up until middle school. Furthermore, contrary to locals, not possessing a local *hukou* entails a number of other challenges, also in relation to securing homeownership, as mentioned in Mr. Wang’s response: outsiders generally do not have access to bank loans in Shanghai, and the housing prices in the city are known to be increasingly rising and prohibitive for many families. As discussed for the locals, homeownership is a key asset in the pursuit of quality education (Ponzini 2020a).

Due to the institutional limitations for this category, as stated above, regular access to public education is assured up to middle school. Of course, the options of attending a private school or an international public school are available as well. Migrant schools are not contemplated by this group, as the qualitative interviews show.

Similarly to the local counterpart, the ultimate schooling preferences for this group are overall split into two main sides as well.

- (1)) Attempting the route of public education, and hoping to rely on connections and relationships to secure access to a quality high school
- (2)) Opting directly for a private school, the quality of which is gradually increasing

Data show that most outsiders (nearly 70%) opted for the choice of private schools. The option of a public school was considered largely given the achievement of a *hukou* conversion by the working parent, and also following homeownership. Mrs. Deng’s insight is significant in clarifying possible routes for this category to secure public education in Shanghai:

“There are two major obstacles for us to give our children a good education: house and *hukou*. We need a house to secure quality education and a house can also facilitate the obtainment of a local *hukou*, needed for public education. My family wants to send our child to a public school, but as outsiders we are subject to constraints. Our strategy is to send her to a public school until it is possible and work on our *hukou* conversion in the meantime, so that our child can go on with her studies in Shanghai. Another possible strategy is *guanxi*. *Guanxi* is key, and you never know when and if you can find useful *guanxi*: most families rely on networks to get into good schools and maybe we could do the same when the time comes.” (Mrs. Deng)

However, the majority of participants actively stated that the quality of private education is gradually improving and “settling” for such an option would not be so bad. Mr Meng stated:

“If we do not secure a local *hukou*, we would definitely send our child to a private school. After all, we have the financial resources to afford it. I know that private schools are generally not viewed as the primary option in China, but to be honest, it seems like their quality is improving, so the choice of a private school due to the lack of a local registration wouldn’t be that bad.”

In terms of curriculum, the majority agreed with the view of the locals: they also favored the Chinese curriculum. Therefore, the majority selected as their primary choice local private education

with a Chinese curriculum, in order for their children to be able to compete in the national university entrance examination.

“International schools are very expensive for the outsider middle class: I reckon this type of school is more in the reach of locals (who usually own a home and enjoy more benefits in general) and definitely foreigners living in Shanghai. Many international private schools do not even admit Chinese nationals, policies are very strict. So we prefer local private schools, which also offer the option of a national curriculum.” (Mr Liu)

Only a minority stated to be considering the option of the more expensive international schools, also due to financial resources (which was needed primarily to secure housing).

6.3. Foreigners

“The main reason most foreign families seek access to the Chinese education system is circumstances. Work brings many of us here and our children have to go to school”, stated Mr. Brown, an entrepreneur with two young children.

Therefore, most foreign participants did not actively seek a Chinese education, but accessed it out of necessity. As foreigners, this group enjoys fewer benefits than locals (e.g., tuition fee for public schooling) but arguably greater benefits than Chinese non-local *hukou* holders (e.g., admission to public schools and no renter discrimination policy). Mrs. Fletcher confirmed:

“Actually, being a foreigner has its advantages in China, although we enjoy our fair share of hardship as immigrants in any country. However, similarly to locals, we also enjoy potential access to all schooling options with no evident restrictions, clearly subject to an additional tuition fee as for public education. I reckon, though, that most foreign families – Western families – do not generally opt for the public option, but rather for international schools” (Mrs. Fletcher)

Again, the preferences for this group are also split into two categories.

- (1)) International private schools, which grant an international education, more in line with this group’s family values. Furthermore, the choice of an international school allows to take classes in English, an opportunity which is also valued by non-English speaking nationals
- (2)) Public schools, which are cheaper and allow an immersion in the local language and culture; furthermore, many public schools now have international divisions, which aid access and integration of expatriates

Data show that most foreign families (over 95% of participants) still opt for international private schools. Data also show that the participants who selected public schools were mainly due to a lack of pursuable alternatives.

“Many foreign families who are left with public schools decide to access the Chinese education system primarily due to the increasingly high tuition fees of international schools (and concomitant decrease in the number of companies paying for them) and also to the fact that these schools are in high demand. Places fill up quickly and waiting lists are very common” (Mrs Owen)

In fact, the general perception of foreigners on the Chinese education is that it is “not meant for foreigners’ needs” and the perceived disadvantages of public schools can be categorized as the following:

- (1)) language barrier, also in the enrollment process
- (2)) large class sizes (over 30 in average)
- (3)) national exam-oriented curriculum (although it is possible to opt for an international one also in some public schools)

Mr Owen elaborated on the subject:

“Most foreigners in Shanghai do not want to opt for the Chinese national education, not because it is necessarily not a good option, but because it is not a good option for a foreigner. The Chinese culture, language and history – among other disciplines – are completely different. The teaching focus and style is also quite unique: I reckon it is of little use having our daughter spend so much time in memorizing Chinese characters at the expense of other skills. Of course there are also international divisions in public schools, but many schools still do not offer this option”. (Mr Owen)

Hence, interviews confirm that public schools for foreigners are still a “settle for” option, and the linguistic and cultural immersion opportunity offered by public education is still not perceived as important. Local private schools are not contemplated:

“The best option for foreign families in Shanghai are definitely international schools, which offer classes in English and develop a curriculum which is more in line with Western values and culture. Furthermore, public schools are focused on the Chinese education system and on the national university entrance examination, whereas international schools offer international curricula. So, should we decide to leave China after some time, our children could easily adapt to a new school in a different country. As for local private schools, I don’t think many foreigners would opt for a similar option: I reckon they are weaker than both public and international private schools, it is not a good compromise.” (Mr. Vance)

7. Conclusions and policy implications

The qualitative analysis presented in the previous section sheds light on the institutional and policy-related implications on Shanghai’s middle-class residents’ decision-making processes as regards quality education strategies.

Owing to both national and local policies as well as institutional regulations (often deeply intertwined), different institutional categories are able to benefit differently from the national education resources allocated by policymakers. Such an unequal access to quality education resources mainly affects two of the three institutional categories taken into consideration in the present article, and which are discerned along the lines of “inclusion” and “exclusion” from a particular social and welfare system. These two categories are the outsiders (i.e. non-local *hukou* holders) and, in minor fashion, foreigners who, however, tend to opt for international education providers mainly due to language barriers, international education aspirations and value-related considerations. Outsiders, instead, albeit favoring the national education strategy to secure quality education and, therefore, social advancement and reproduction through cultural capital, are directed toward the local private option due to institutional constraints.

The pattern that emerges from the empirical findings of this research, aimed at investigating practical effects and consequent quality education strategies of the three institutional subjects, is the following: strategies and decisions related to securing cultural capital, in particular quality education, of China’s middle-class residents tend to be parallel to the “geographical” and institutional frames of the subjects. The local middle class (those who share the most institutional advantages) select national education providers; the outsider middle class (whose access to national educational resources is challenged by their *hukou* status) select local private schools, opened through market means as opposed to national institutional means; and the foreign middle class (who are overall in a medium position between the other two categories, but share different language, culture and education aspiration) select international private education providers.

Such a pattern naturally owes to the connection between national policy goals and regulations and the distribution of educational resources, directed at the expansion and quality improvement of national education providers (especially public key schools). Hence, the local middle class, who enjoys local institutional privileges, is the group which naturally benefits from quality national education resources.

Instead, the non-local Chinese middle class is able to secure cultural capital as well as social advancement primarily through market means and, therefore, local private education providers. The last group of foreign middle-class members mainly select international education not owing to institutional constraints, but rather to the limited degree of internationalization of China's national education system.

The qualitative empirical analysis conducted as part of this research serves the purpose of providing a practical case study of the effects of both national and local policy as well as the institutional context which surrounds the quality education discourse in China, aimed to promote national development and a high-quality middle class. However, the qualitative interviews confirm that institutional as well as policy-related decisions on education resource distribution are affecting the strategies of the outsider middle class especially as regards securing cultural capital and social advancement through quality education. China's education system, in fact, largely favors national education providers, which are fully available merely to local residents. If the outsider middle class must primarily rely on market means for social advancement, educational reforms which either regulate *hukou* conversions and institutional constraints for outsiders, or drastically improve educational resources of local private education providers should be enacted. As for the foreign middle-class group, the main suggestion for reform is connected to a higher degree of internationalization in China's national education system, which would welcome international backgrounds in the local education system.

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Notes

1. See for example, F. Wemheuer, *A Social History of Maoist China* (Cambridge: Cambridge University Press, Wemheuer, 2019)
2. For detailed definitions and categorizations of the Chinese middle class, see D. Goodman (2014) and Ying, 2016a)
3. For reasons of focus, this article does not examine vocational education, a topic which deserves full attention in a dedicated research project
4. In a separate research project, which dealt with education for working-class migrants in Hangzhou, findings showed how this category aimed for a place in private schools, although most of them had to settle for migrant schools due to the lack of documentation and financial resources.
5. http://www.360doc.com/content/17/0909/18/11668206_685797266.shtml (Chinese)

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