

Clear the hurdles

International schools in emerging countries are enjoying great demand but are facing infrastructure challenges. Richard Gaskell reports on the opportunities and obstacles evident in the Philippines and Cambodia

As demand for English-medium learning expands around the world, and the desire for higher education in the West continues to increase, so new countries continue to emerge within the English-medium, K-12 international schools market.

School growth in developing countries is often not restricted by demand so much as held back by such challenges as infrastructural limitations or a lack of government recognition of educational choice.

Two countries where demand for international education is gathering pace are the Philippines and Cambodia. Both have the potential for international school growth as their economies strengthen, but only if challenges are addressed.

Real estate

In the Philippines, growth is likely if development sites in central business districts can be allocated. Already regarded as the world's business services capital, the Philippines is now outperforming global giants like India and China in many parts of the service sector. Further economic growth is anticipated in line with the government's plan to make the Philippines a high-income country by 2040.

There are currently 62 English-medium international schools in the Philippines, enrolling 27,600 children. Over the last five years, enrolment has grown by 39 per cent and the number of international schools has grown by 24.5 per cent in the country. All but one of these have been in the non-premium international schools sector. These schools typically offer lower enrolment fees, are not accredited, nor are they members of a reputable international school association. Many of these schools rely on the "international" name, the language of learning, and the international exams they offer to attract students. But the quality of the teaching and learning, resources and facilities may be of a lower standard. ISC Research categorises 42 of the international schools in the Philippines within this category.

However, an increasing number of affluent, middle-class Filipino families, as well as expats living in the Philippines, want places for their children in the premium school sector. There are currently 20 premium international schools in the Philippines meeting the learning needs of 11,000 students. Only one new premium

school, the King's School Manila, has opened in the country since 2012, yet demand has continued to increase, particularly in those premium international schools located in the main residential areas. Here, capacity is very high, especially in the British-oriented schools which have seen the greatest rate of enrolment growth in the past five years.

Location is the main influence on capacity of the premium international schools in the Philippines. The British School Manila and International School Manila; two highly sought-after premium international schools, both located in Makati City, one of the country's central business districts, have long waiting lists. More premium international schools are required in this and other central business districts like Fort Bonifacio. But school development is restricted due to the lack of available real estate, and transport infrastructure restricts easy access



to schools located further afield. Until residential and commercial markets expand beyond the major central business districts, demand for international school places will remain localised.

David Toze is superintendent at International School Manila. "Location is everything when it comes to the viability of top schools, and possible sites for new schools are scarce indeed," he says. "International School Manila and British School Manila are at capacity now. Brent International School is situated well south of Manila, which is an impediment to present growth, though that may change with the plan to create a second city in the Laguna area," he adds.



As commercial and residential markets, like the new city in Laguna, expand, so premium international school development could increase beyond the existing central business districts of Makati City and Fort Bonifacio. It's early days for the international schools market in the Philippines, but with demand already evident, and an economy with potential to improve, so development of this market is likely.

Roads hamper growth

Also in south-east Asia, Cambodia, one of the ten fastest-growing economies in the world, has enjoyed two decades of strong growth. Public education reforms were introduced in 2013, but demand for private education is growing, particularly from young Cambodian families with increasing disposable incomes, many of whom believe in the value of a western education for their children. As a result, there has been a significant increase in the English-medium international school sector during the last five years, with the number of campuses growing by 61 per cent.

Today, there are 121 English-medium international schools in Cambodia, including 14 that are considered premium schools. 28,500 children between the ages of 3 and 18 are enrolled, and 14 per cent of these attend the premium international schools. Local students now massively outnumber any other nationalities at international schools, and even in the premium schools which typically attract more of the expat population, local

Cambodian children make up 47.5 per cent of the enrolment.

Tuition fees at the schools here are generally low compared to the global international schools market. These have increased by an average of 3.9 per cent each year for the past five years to US\$5,210 today but continue to attract a growing number of Cambodia's middle-class. So much so that there are now waiting lists at several schools.

However, international schools in Cambodia, like the Philippines, continue to suffer because of limited land for school development where it is needed most. In addition, the poor infrastructure of a still-developing country is having a big impact. Journeys are known to be lengthy, congested and even unsafe due to large potholes and cracks, and outdated drainage systems in the roads, even in major cities such as Phnom Penh where most of the international school campuses are based.

Once such basic infrastructure is improved, Cambodia's international school sector will develop as it has an excellent potential to do so.

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