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MARKET NEWS BULLETIN

11 June – 24 June

Compiled by Nastja Pusic

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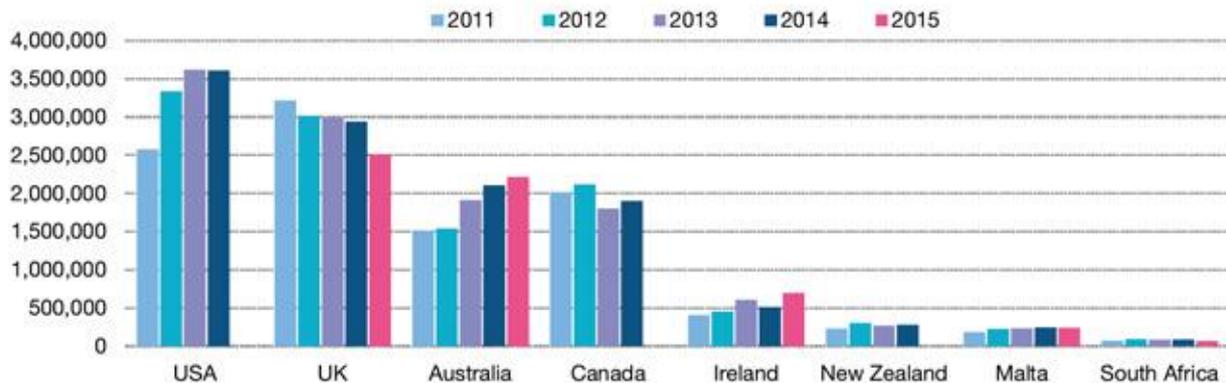
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UK ELT student weeks down 13% in 2015 (22 June)

By ICEF Monitor staff: 22 June 2016

- New data from English UK reports an 8% decline in English Language Training (ELT) student numbers between 2014 and 2015, and a 13% decline in student weeks
- An analysis of 114 sending markets for British ELT schools found that two-thirds (75) declined between 2014 and 2015
- The association attributes the declining numbers for 2015 to the strong British pound, increasing competition, British visa policy, and softening global demand
- Among sending markets that grew last year, notable gainers include Czech Republic, China, Kuwait, Oman, and Chile

Major English-speaking ELT destinations by student weeks



Source: StudentMarketing

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Scotland's universities seek to boost their overseas influence (22 June)

By Andrew Whitaker: Holyrood: 22 June 2016

How much benefit does the opening of overseas campuses deliver to students in Scotland, as well as the Scottish higher education sector as a whole?

THE reach of Scotland's universities now stretches far beyond our homes shores, with campuses from Scottish institutions springing up in far flung destinations, in particular the Middle and Far East.

Universities are now seeking to trade on their expertise in specialist areas, with Aberdeen, one of Scotland's ancient institutions, out to capitalise on its expertise in the oil and gas sector with the launch of a campus in South Korea in March 2017.

In the United Arab Emirates, the opening of Heriot-Watt University's £35m campus in Dubai is one of the most significant overseas operations launched by a UK higher education institution in recent years.

The university's website talks about how it offers an "expanding range of high quality British degrees to students in the United Arab Emirates and wider Gulf region" at its Dubai campus.

However, Heriot-Watt states that it also allows UK students to transfer for a year or a semester to its overseas campuses in Dubai and Malaysia.

A university spokeswoman said: "Internationalism has always been a concept that Heriot-Watt approaches differently: many universities export their expertise but Heriot-Watt has taken its vision, root and branch, to centres across the world."

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USA and Canada

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California approves bill to limit out-of-state student numbers (7 June)

By Ellie Bothwell: THE: 7 June 2016

Audit of University of California system finds that institution enrolled less-qualified non-resident students to boost revenue.

The California Assembly has passed a bill restricting the number of out-of-state students the University of California system can enrol.

The bill limits the proportion of non-Californian students at the nine campuses to 10 per cent of total enrolment by autumn 2022. Out-of-state undergraduates currently make up 15.5 per cent of total undergraduates on the system's campuses.

It also requires the university to admit only non-resident students who exceed the academic qualifications of residents.

The bill was passed after a state audit of the university system in March 2016, which concluded that it was enrolling less-qualified students from outside the state in order to boost revenue – a move that it concluded has “disadvantaged California resident students”.

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US: Long-awaited SEVP guidance “coming soon” (15 June)

By Beckie Smith: The Pie News: 15 June 2016

Long-awaited guidance from the US Student and Exchange Visitor Program on conditional admission, pathway programmes and English proficiency is due to be published “in several weeks”. An online student portal for OPT is also in the works for later in the year.

New security authorisation processes for designated school officials accessing the Student and Exchange Visitor Information System are set to be rolled out by the end of the year.

Guidance on key issues was due to be published in early 2016, but has been delayed as SEVP has been putting its resources into finalising a ruling on the STEM Optional Practical Training programme, resulting in a “rather significant backlog on guidances”, Mike Hallanan, policy analyst at the SEVP systems management unit said.

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Call to close largest college accreditation agency (16 June)

By Brendan O'Malley: University World News: 16 June 2016

The United States Department of Education has recommended that the largest national accreditation agency be stripped of its power as gatekeeper of billions of dollars of financial federal aid for independent colleges, a move that would shake up for-profit higher education.

The call comes after more than a year of criticism of the Accrediting Council for Independent Colleges and Schools, or ACICS, fuelled by the poor record on student outcomes of some of its member colleges and allegations of misconduct at some of those institutions.

An independent advisory board will consider the Department of Education's recommendation when it decides ACICS' fate next week and will make its own recommendation. A final decision will then be made within three months. ACICS could then appeal but if the appeal is upheld, colleges will have to find a new accrediting agency within 18 months in order to be able to continue to receive federal aid.

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Mapping international pathway programmes in the US (20 June)

By ICEF Monitor staff: 20 June 2016

- A new research project seeks to explore the growth of pathway programs in the US, particularly those offered in collaboration with private-sector pathway providers
- It identifies and analyses 45 US pathways, for which institutions have partnered with eight private providers
- The study is ongoing and a final study report is expected in fall 2016

Pathway programmes are gathering steam in English-speaking destination markets, and are often offered in collaboration with specialised pathway providers. For participating institutions, the pathway model represents a further international recruitment channel that combines the marketing expertise and networks of private-sector partners with the academic programming, facilities, and student services of the college or university.

There is a fair bit of variability in the pathway segment but such programmes often share a couple of basic characteristics:

- They are targeted to students preparing for admission to English-medium undergraduate studies; and especially those requiring English training or other preparation for academic studies; and
- They typically combine academic content with English language studies, study skills, and cultural adaptation courses.

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New data reveals major slowdown in Canadian growth (13 June)

By Beckie Smith: The Pie News: 13 June 2016

New international student intake growth in Canada is slowing, standing at 4.5% in 2015 – less than half the year-over-year growth rates reported in 2014 and earlier. The figures mean that universities can no longer be complacent when it comes to attracting international students, according to the Illuminate Consulting Group, which compiled the figures.

Presenting the topline figures and insights of a 50-page report commissioned by the Canadian government on the fringes of the recent NAFSA conference, ICG's managing director, Daniel Guhr, warned that universities should act now or face losing students to competitors.

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Elite universities break away by calling for cap on student places (15 June)

By Matthew Knott: The Sydney Morning Herald: 15 June 2016

The nation's elite Group of Eight universities have proposed that the federal government reintroduce limits on how many students each university can enrol, a suggestion slammed by other vice-chancellors as "cancerous" and "selfish".

The Group of Eight, which includes the University of Sydney and Melbourne, on Wednesday released a paper calling for a "moderation" of the demand-driven system that allows universities to enrol as many students as they want.

Group of Eight chair Michael Spence said the uncapping of university places in 2012 had blown out the budget by billions of dollars while leaving important university research underfunded.

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Aus: PwC acquires 15% of TOP Education (22 June)

By Natalie Marsh: The Pie News: 22 June 2016

PricewaterhouseCoopers in Australia has acquired a 15% stake in Australian private higher education provider, TOP Education, in order to "encourage closer collaboration" between Australia and China's international education sectors.

TOP Education, based in Sydney, is one of the 42 institutions in Australia on China's 'white list' of trusted education providers for Chinese students, the Jiayou Shewai Jianguan Xinxi Wang.

Minshen Zhu, founder of TOP Education, said that the two companies working together "will encourage closer Australia-China collaboration in the sector".

"TOP and PwC will play major roles in helping Australia's education export sector grow through a reputation for quality and innovation," he added.

TOP Education provides undergraduate and postgraduate degrees in business and is the only non-university institution offering Australian law degrees.

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India: open up to foreign providers, recommends think tank

By Beckie Smith: The Pie News: 20 June 2016

Foreign universities could help to meet booming demand, bring much-needed foreign investment and drive up quality in India's higher education system, according to the think tank tasked with crafting proposed policy for foreign HE providers to operate in the country.

The National Institution for Transforming India Aayog submitted its roadmap for reform this week, which includes allowing high-quality foreign institutions to set up universities in India and to establish joint-ventures with domestic partners.

Prime Minister Narendra Modi has shown signs that he is ramping up efforts to position India as a global study destination, and last year asked the organisation to assess the feasibility of enabling foreign HE institutions to finally operate in India after decades of discussions about the issue.

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Leaving the Soviet model of control over universities (19 June)

By Gerard Postiglione and Xiaoyu Chen: University World News: 19 June 2016

As China finds itself inching closer to becoming the world's innovative largest economy, it looks to its universities to sustain the pace of economic growth. More than a few scholars question whether this is possible with the limited autonomy accorded by the state to China's universities.

China already has the largest system of higher education and more research funding and scientific publications than any other nation except the United States. Top universities can recruit from Shanghai secondary schools, where students outperform their counterparts in 60 OECD – Organisation for Economic Co-operation and Development – countries in mathematics and science achievement.

Over the past 20 years, universities have made major changes. The 'iron rice bowl' of the planned economy is gone. After years of studying for free, students now pay tuition fees. Small universities have been merged to create economies of scale. Teaching is more regularly assessed. Faculty research productivity determines promotion.

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Why some Chinese families are spending a fortune on sending their children to international schools (19 June)

By Li Ying: Global Times Published: 19 June 2016

It took a lot of thought, but in the end, Lily Li decided to enroll her 6-year-old daughter Flora in an international school not far from her home in Beijing's Shunyi district. It was a significant decision for the Chinese family, which they made after comprehensive consideration, research and comparison among Beijing's public and international schools.

"It was a struggle for me and my husband," said Li, 39, a housewife and entrepreneur. "Compared with China's traditional education path, we consider the Western educational philosophy and system to be better," explained Li, who got an MBA from an American university and previously worked for a multinational company.

Li is one of a growing number of China's burgeoning middle-class families who are willing to spend a veritable fortune to send their children to international or private schools that operate according to international educational principles.

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Bangladesh one of top 5 emerging markets for 2016 (13 June)

By Sarker Asif Iqbal: British Council: 13 June 2016

Euromonitor International has identified Bangladesh as one of the top five emerging markets with the strongest growth potential in 2016. Other countries include India, Kenya, Indonesia and the Philippines

Economic growth in Bangladesh was strong in Fiscal Year 2015 despite political protests that hindered exports and private investment. Global headwinds notwithstanding, growth is expected to edge up in the next 2 years on steady expansion in garment exports. The goal of graduating from low- to middle-income status requires much higher investment and thorough reform to improve the business environment, boost budget revenue, and strengthen financial discipline

Fast facts:

- Bangladesh economy to grow 6.7% in FY2016 on strong garment exports, rising consumption
- GDP growth in Bangladesh will cross 7.0% in FY2016 which was 6.6% in FY2015 and 6.1% in FY2014
- Bangladesh is now the world's second-largest garment exporter after China
- These five countries are on the path of significant economic reforms with a target to improve their business environment. Therefore, Bangladesh proves to be a good option for future investments

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Ghana emerging as an important sending market in Sub-Saharan Africa (17 June)

By ICEF Monitor staff: 17 June 2016

- Ghana’s economy has outpaced overall growth rates in Sub-Saharan Africa for the past decade and more
- Demand for higher education is growing in the country, but Ghana’s higher education system is struggling to keep pace and there are significant quality issues
- This has led in turn to persistent concerns for the employability of graduates
- Outbound mobility continues to increase and Ghana is now the second-largest source of Sub-Saharan students in the US, after only Nigeria

Sub-Saharan Africa has become an increasingly important region for international student recruitment, and is home to a number of significant emerging markets, notably Nigeria and Kenya. The region sent just over 33,500 students to the US in 2014/15, and a similar number to the UK.

GDP growth in Ghana, per capita values as well as year-over-year growth compared to regional averages, 1991-2013



Source: World Bank

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Germany and Netherlands step up TNE activity (14 June)

By Nic Mitchell: University World News: 14 June 2016

Germany and the Netherlands are stepping up their game to capture a bigger slice of the transnational education or TNE market, a conference launching a new international TNE-Hub heard on 10 June.

Around 70 representatives from the transnational education world gathered in Nottingham Trent University in the United Kingdom for the research symposium looking at ways to share good practice and support the development of efficient and effective TNE strategies to help export of higher education services.

Some of the biggest changes are planned in the Netherlands, which up to now has seen no government funding for TNE developments and only one publicly funded Dutch university – Stenden University of Applied Sciences – having any branch campuses.

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