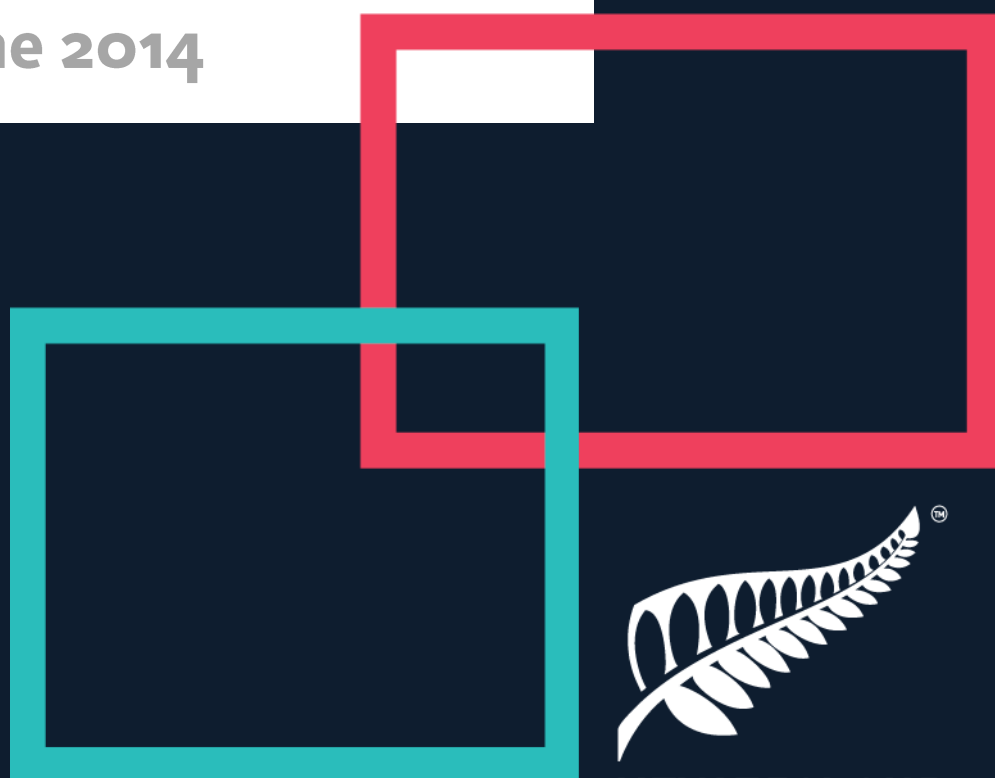


# International Education Scanning Report

June 2014



NEW ZEALAND  
EDUCATION

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**Authored by Dave Guerin of  
Education Directions (Services) Limited  
(with research by Stuart Peters)**

**If you need further information on international education please contact:  
Business Development Team  
Education New Zealand  
Phone: 04 472 0788  
Email: [ebd@enz.govt.nz](mailto:ebd@enz.govt.nz)**

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Education New Zealand (ENZ) has contracted Education Directions (ED) to provide this monthly scanning report of the international education environment. The purpose of the reports is to develop a better shared understanding of the international education industry. Reports are intended to facilitate, not lead, discussion.

Feedback is welcome - contact Dave Guerin (ED) Directions, at 0800 500 552 or [dave@ed.co.nz](mailto:dave@ed.co.nz). If you wish to contact ENZ, please contact the Business Development Team [ebd@enz.govt.nz](mailto:ebd@enz.govt.nz).

## June 2014 Executive Summary

This month's report has a new structure. The Immigration and Government sections have been combined into a new "Government" section, and a new set of headings have been developed. The headings are intended to support our structured search process, and enable easier scanning by readers. We don't think the headings are quite right yet, but we'll be testing them with some readers. Let us know if you have any thoughts.

### Markets

1. NZ international enrolments in 2013 were down 2% on 2012, but tuition income was up 1%. The university sector grew the most, while the English language and private training establishment sectors declined the most. Indications were good for higher growth in 2014.
2. Canadian student entries were up 7% in 2013. Most growth was in non-university sectors. English language enrolments were down 9%.
3. German 2013 international enrolments were up 7%.
4. Australian 2013 ELICOS course weeks were up 19%.
5. Australian universities had 8,305 international formal agreements and 821 offshore programs in early 2014.
6. Open Universities Australia did well at attracting international students to its MOOCs (80% of recent cohorts).
7. A report on the use of education agents in Canada is well worth reading, as it explored the benefits, costs and practical issues involved in the area.
8. An EU survey on studying and working abroad would be a useful input to market segmentation.

### Government

9. Connected Scotland was launched to boost Scottish higher education exports.
10. Two influential Canadian groups called for a new Crown corporation (Education Canada) to spearhead the federal international education strategy. They also called for more government spending in the area, better data collection and a major study abroad programme.
11. A study of US states' involvement in international education showed considerable variation, with about half of the states having promotional websites.
12. The NZ government provided an update on progress on its strategy. A wide-ranging and supportive work programme is in place, but enrolments have declined since 2010 (the Christchurch earthquakes were a factor). The 15-year targets are not on track for achievement by 2025 at this stage, other than the target for postgraduate enrolments.
13. China plans to turn 600 of its universities into institutions of applied learning or polytechnics.
14. The UK English language testing scandal that started in Feb 2014 with a BBC investigative story led to major action in late June. The Educational Testing Service's (ETS) license to operate was not renewed, a criminal investigation started into them (and related parties), and 57 private colleges had their immigration licenses suspended, along with Glyndwr University (two other universities could not sponsor new students). Students are being investigated, as are providers. The original English language testing scandal has expanded considerably.
15. Russia approved a major new scholarships scheme to send their students abroad, while Brazil renewed their even larger Science without Borders scheme, and Canada started a new Commonwealth study abroad scheme.
16. India evacuated its students from Eastern Ukraine.

## Markets

### Market Size and Value

**New Zealand** Education New Zealand released its [NZ International Education Snapshot – 2013 Full Year Report](#) (19 pages) on 12 June, with the main points summarised below ([Ministers' media release](#)).

- A decline early in the year was partially offset by later growth, but enrolments were down 1.8% on 2012 (-1,811). ENZ attributed most of the change to declines in the South Korean market and the private training establishment (PTE) sector.
- Tuition income was up 1.3%. This was helped by the 4% growth in student numbers in the longer-duration, and higher-fees, university sector. Postgraduate enrolments were up 11%, while universities achieved almost all their growth from the Chinese market.
- Tuition income was down 7% amongst English language schools and 6% amongst PTEs.
- Student numbers were up 11% in Canterbury, an area that benefitted from a trial of work rights for English language students, and extra promotion efforts.
- The only qualification level to decline in each of the last 3 years was Level 5-7 certificates and diplomas. That may have been affected by immigration policy changes in 2011-12 that reduced the value of such qualifications in gaining residence or work permits. ENZ attributed the declines to other factors, such as global competition and declining South Korean enrolments.
- The countries with highest growth in enrolments were Japan, China, India and Thailand. The largest decreases were from South Korea, Saudi Arabia, Malaysia and Vietnam.
- Q1 2014 visa approvals were 22% up on Q1 2013, driven by growth from India and China. A new work rights policy is likely to have helped.

Overall, New Zealand had a flat year in 2013, but growth is looking considerably better in 2014.

**Canada** The Canadian government released Q4 2013 data on entries by foreign students, by [country](#) and by [gender/level of study](#) on 26-27 June.

- Dec 2013 year total student entries were up 7% (to 111,841) compared to the Dec 2012 year.
- Looking at the top 10 markets by size, most changed by +/-5%. China (1<sup>st</sup>) was up 14%, France (4<sup>th</sup>) was up 11% and Nigeria (10<sup>th</sup>) was up 38%.
- University enrolments were up 0.2%, but school (6%), other post-secondary (21%) and other (31%) sectors were all up by more. Trade enrolments were down 33%.
- Male enrolments were up 6% while female enrolments were up 8%.

Languages Canada released its [2013 survey statistics](#), with 129,704 enrolments and C\$495m in tuition revenue. Enrolments were down about 13,000 or 9.3% on 2012 ([2012 Survey](#)). [The PIE News](#) reported that British Columbia was the worst affected, and negative factors on enrolments included the visa officers' strike, the loss of co-op work study programmes.

#### Snippets

- **Germany** Figures from the German Academic Exchange Service (DAAD) show [the number of international students in Germany increased by 7% to 300,000 last year](#), making the target of 350,000 by 2020 achievable. The report also showed growth in study abroad (but not enough to achieve a high target) and in partnerships with foreign universities.

- **US** i-graduate has released the first in a series of four reports on the US international education market (the series is presumably part of their [US expansion in 2014](#)). The first report explored [how US enrolments compared to those of other countries](#), including some very useful exploration of data sources.
- **Australia** The latest quarterly government [projection for net overseas migration](#) predicted that annual student visa arrivals will rise from 83,000 in the June 2014 year to 123,000 in the June 2018 year. They also expect student departures to decrease over the period as improved post-study work rights are utilised. English Australia released a [Survey of major ELICOS regional markets in 2013](#) (executive summary only) that showed course weeks were up 19% in 2013.
- **Canadian Schools** The Canadian Association of Private Schools – International [identified French-language schooling as its biggest growth market](#).
- **France** Campus France, the official international higher education promotion agency, published a report in late May on [European student mobility](#) (in French), on students received and sent by European countries.

## Market Changes

- **Chinese Local Enrolments** Canadian analyst Alex Usher pointed out that [some Chinese provinces had not met their higher education enrolment targets](#) ([China Daily](#)), and suggested it was less about declines in cohort size and more about lower demand for higher education.
- **Philippines** The pros and cons of four Filipino universities [shifting their academic calendar to align with international standards](#) were explored.
- **Confucius Institutes** A report by the American Association of University Professors (AAUP) [criticised universities for not guaranteeing academic freedom when accepting Confucius institutes](#). China's Confucius Institute Headquarters [has urged Toronto District School Board not to suspend Toronto's Confucius Institute](#) (the link is to a Falun Gong affiliated outlet).
- **Canada Association** The Association of Canadian Community Colleges [has been rebranded as Colleges and Institutes Canada \(CIC\)](#).
- **Mergers and Acquisitions** Navitas is [set to acquire California-based creative media college Ex'pression for US\\$13m](#) (via its SAE Institute subsidiary), [US-based International Studies Abroad has merged with Australia-based GlobalLinks Learning Abroad](#), and [Spanish language provider Ideal Education Group \(IEG\) acquired Malaga Si](#).
- **Bond Market** 2 Australian universities (Melbourne and Sydney) have raised \$450m in bond money between them in 2014 – the funds will be used, in part, to [help them develop world class facilities](#).
- **Market Reviews...** covered [Ecuador](#), [Peru](#), and [Thailand](#).

## Transnational Education

**United Kingdom** The UK's Higher Education Academy published a pair of reports [on student and staff perspectives regarding the quality of learning and teaching in transnational education](#) on 30 May.

- *Enhancing student learning and teacher development in transnational education* (48 pages) drew upon a literature review, a small survey of UK higher education leaders and managers, and a small focus group of UK transnational educators. It would be a useful guide to the issues for anyone involved in transnational education (although nothing seems new or surprising), as long as the small sample sizes are kept in mind.
- *Transnational education – the challenges of partnership and representation in a global context* (28 pages) is a more useful report because it comes from a new perspective – how transnational students are represented within institutions, and what is known about their experiences. Most of the research focused on student union staff and representatives, and

found that offshore campuses often had limited student representation. There was also a 20-page toolkit.

**Australia** Universities Australia [released two reports about their members' offshore activities](#) on 16 June. A 7-page report on offshore provision identified 821 programs from 34 universities. There were 31 offshore campuses, with the University of Canberra having 9, and the University of Southern Queensland having 5. Malaysia (24%), Singapore (20%), China (11%), and Hong Kong (11%) hosted the highest proportions of offshore programs.

A 12-page report on links with offshore institutions identified 8,305 relationships (up from 220 in 1990). The University of Sydney alone had about 700 relationships. The greatest numerical growth in numbers of relationships by region from 2003 to 2014 was in North-West Europe and North-East Asia. The country with the most relationships was China, followed by the USA and Germany. The countries with the highest percentage growth in the number of relationships from 2003 to 2014 were India (400%), France (141%), China (130%), Germany (122%) and the UK (106%).

### Snippets

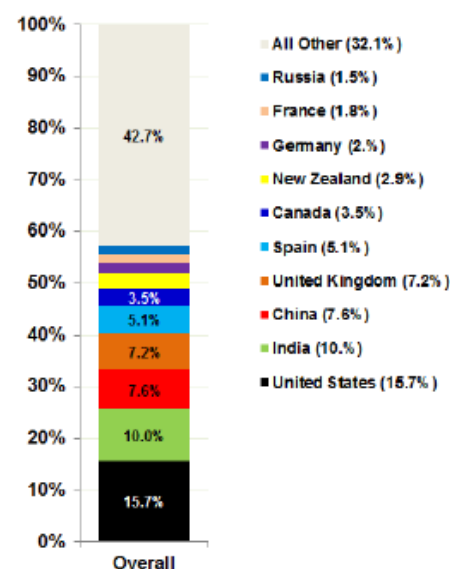
- **US Experiences** Here's a useful overview of US universities' [experiences in establishing international branch campuses](#).
- **New Campuses** Taiwan's Ming Chuan University [opened a campus at the SVSU Regional Education Centre in Michigan](#) (teaching an MBA and a Mandarin degree).
- **Kazakhstan** TVET UK will work with Ravensbourne College [to deliver the design element of the Kazakh government's 'World Class College' initiative](#).

## MOOCs

June was a good month for sharing of data about the performance of MOOCs. Open Universities Australia [released its June 2014 Research Report](#) (155 pages) on data from the first nine intakes for its Open2Study platform. The 23.8% average completion rate was well above the industry average of 8.5% for auto-graded courses. Later cohorts had 70-80% overseas enrolments, while the range of source countries increased. The overseas student proportions are shown by country in the chart at right.

The Chronicle of Higher Education analysed a [30 May release by Harvard and MIT](#) of a dataset from their first 8 MOOCs on edX. The Chronicle's analysis identified "[8 things you should know](#)", covering location, gender, engagement and other factors relating to the students. edX CEO Anant Agarwal also said [traditional higher education providers can learn from MOOCs](#), bringing automated grading and better content back into the physical classroom.

Total Overseas - cohorts 1 to cohort 9



\* Data on Australia excluded.

Figure 1- Open Universities Australia Students



## Recruitment

**Canada and Agents** Canada's Council of Ministers of Education of Canada (CMEC) released a [96-page study on the role of education agents in Canada's education systems](#) in June, although it was dated Dec 2013 ([PIE News](#)).

- All language schools and private colleges used agents, while two thirds of public universities and colleges used them. Use has increased overall in the last decade.
- The education sector was reasonably (but not completely) confident that agents gave students accurate information, but government respondents had considerably less confidence. A similar disparity occurred over the groups' confidence about agents' adherence to laws and policies.
- The paper reviewed the regulatory environment for agents in the US, UK, Canada and Australia.
- Respondents said that agents were essential to gain scale in the market, especially for those institutions without a very strong international reputation.
- Institutions varied widely in their management of agents, with some having attracted hundreds of agents (mostly inactive) through open acceptance processes. While guidelines on effectively managing the relationships were readily available, many institutions avoided conflict with agents in order to keep the flow of students running.

The section on agent-institution (pp.25-35) and student/parent-agent relationships (pp.36-37) are a good overview of the area and would be valuable reading by most involved in international education.

### Snippets

- **India** A report by the Associated Chambers of Commerce and Industry of India (ASSOCHAM) says [Indian students are increasingly choosing Singapore, Canada, Germany, France and China](#) over the traditional UK (visa tightening) and US (slow job market) destinations. ASSOCHAM pushed for stronger domestic institutions, including branches of foreign institutions, in order to reduce the outflow of students.
- **Korea** A blog post covered [how Korean students research their university study opportunities within Korea and abroad](#).
- **ELT Infographic** The PIE News has produced an infographic [on trends in ELT sources and destinations](#).
- **United States** Study Travel Magazine on [how scholarship schemes in Saudi Arabia and Brazil have changed the nationality mix in US intensive English programmes](#)

## Study Pathways

**EU Survey** A 17 June release of [an EU survey on the 'European Area of Skills and Qualifications'](#) had a significant section on studying and working abroad, (pp.42-84). Some EU citizens had concerns about the recognition of their qualification in other EU countries, or their offshore qualification in their home country (few had heard of the EU's initiatives to support such recognition either). The research also looked into barriers to working or study abroad. Overall, it would be a good input into market segmentation in Europe.



### Snippets

- **International Education School** Beijing Foreign Studies University has launched a new School of International Education [specialising in foundation courses to prepare Chinese students to go abroad](#).
- **United Kingdom** Study Travel Magazine surveyed academic preparation courses in [the UK](#) and [the US](#).
- **Australia** A 1-page snapshot was released [on study pathways of international students in Australia, 2012-2013](#).
- **Dual Degrees** The British Council released a report on [dual degrees in transnational education](#) (US\$200).

## Retention and Achievement

- **Hardship Fund?** The UK's National Union of Students (NUS) wants a [national hardship fund for international students to be piloted](#) (including loans and grants), alongside making existing institutional funds more generous.
- **Integration on Campus** A UK Council for International Student Affairs report was released [on promoting integration of international students on campus](#) (44 pages). The report draws on academic research, i-graduate International Student Barometer data, and UK case studies. It suggests open-ended actions and would be a good resource for developing or reviewing an institution's policy on integration.
- **Research Digest** IERN published a 10-page research digest [on employment, work placements and work-integrated learning of international students in Australia](#). It's a practical and useful document.

## Study Abroad

- **United Kingdom** The University of Sunderland has [joined a growing number of institutions waiving fees for UK language students on a study year abroad](#). Students are currently liable for up to 15% of full fees.
- **Research Digest** IERN published a research digest [on the impact of education abroad on student outcomes](#), looking at some of the most influential US studies.

## Rankings and Indices

- **Global Testing** Elite universities are apparently [opposing OECD attempts to introduce PISA-style tests for higher education students](#). The Assessment of Higher Education Learning Outcomes (AHELO) scheme tests third-year students' competencies, but it does seem to have stalled after its pilot.
- **THE Asia** Times Higher Education released their [Asia University Rankings 2014](#). They drew upon global R&D spending figures to show a [large increase in the proportion spent in Asia from 2001 to 2011](#) (9%), with drops in the share held by the US and Europe. They also explored [differences by country within Asia](#).

## GOVERNMENT

### Overarching Strategies

**Scotland** Connected Scotland, a group aiming to boost Scotland's higher education exports from £1.3b in 2011/12 to £2b by 2017, was [launched in June](#). They have identified the following priority markets: Brazil, China, Malaysia and Mexico/Colombia. The selection was based on a [64-page market analysis](#), which has some wider interest as it explores how the priority markets should be selected. Appendix B has useful summaries of the highest opportunity markets.

**Canada** A Canadian business group and a foreign relations council put out [Canada's International Education Strategy – Time for a Fresh Curriculum](#) (21 pages) on 18 Jun. The report argued that Canada is not pulling its weight in international education, when compared to Australia, the USA and the UK. The challenges facing Canada included poor official statistics on international education, a weak national voice, and too great a focus on student numbers and revenue. The recent federal international education strategy and immigration rule changes were noted as positive initiatives. They called for:

- a balanced strategy to bring students to Canada, send Canadians offshore, develop cross-border partnerships, and support soft diplomacy.
- a new Crown corporation called Education Canada to promote the federal international education strategy;
- a new international brand;
- investing more money than the budgeted C\$5m, including for a major study abroad programme like the USA's 100,000 Strong in the Americas; and
- better data collection.

The Canadian Association of Public Schools – International also called for [more promotion of Canada's bilingual education opportunities](#).

**US States** The Rockefeller Institute of Government (State University of New York) [looked at the role of US State Governments in the internationalisation of higher education](#) (46 pages). The role of the individual states is important, given that the US has relatively weak federal education institutions. The top higher education officials from 26/50 states responded to a survey, with some key findings shown below.

- While the university system was keen on international education, support was much lower amongst governors, legislators and chambers of commerce.
- 25 states had formed consortia to promote international education, while 27 promotional websites were listed on pp.16-17 (including 2 city-based consortia in Pennsylvania).
- Most consortia focus on higher education, but some include community colleges and high schools.
- State involvement in internationalisation varies considerably and tends to be facilitative, rather than directive.
- Four case studies were provided, covering Maine, New York, Oregon and Texas.

**NZ Strategy** The NZ government provided an [update on progress towards its international education strategy](#) (16 pages).

- The report listed government actions over the last 3-4 years, which reflect a wide-ranging work programme that has been, on balance, supportive of the international education industry, and proactive.
- The list of government actions did not include the reduced credit given for lower level qualifications when applying for work or residence permits. Those changes significantly reduced student demand, but the demand had been created by the points settings in the first place, and immigration outcomes for such students were weak.
- Enrolments have declined since 2010, although total and first-time visa approvals have risen in the March 2014 year. Offshore enrolments have grown about 10% since 2009, from a low base. Postgraduate enrolments rose about a third from 2009 to 2013. The Christchurch earthquakes had a significant impact on enrolments in the period.
- Over the next 3 years, the government plans to: expand promotion (including the Think New brand); implement sector roadmaps for development; implement an online visa system; encourage NZers to study abroad; and carry out research on the sector.

The update on the strategy does not clearly report against the targets and timeframes set out in the original strategy (the 2011 [Leadership Statement for International Education](#)). If the targets and results are compared, a number of the targets do not appear to be on track for achievement, such as overall economic value or offshore enrolments. A 2011 target to increase the transition rate from study to residence was reported on in the 2014 update using exactly the same chart. Postgraduate enrolment growth is the main target that is tracking well. A report on 2013 enrolments in the Markets section of this report provides more detail on enrolments, which are tracking well for 2014.

#### Snippets

- **Turkey...** [wants to host 100,000 international students in 2015](#), increasing to 150,000 by 2020. Its numbers more than doubled from 30,000 in 2011, to 70,000 in 2013.
- **Malaysia...** [reported more than 103,000 international students in 2013, and is targeting 200,000 by 2020](#).
- **Malta...** plans to [establish an education hub and position itself as “the next Singapore or Dubai”](#).
- **Learn Chile** A group of 21 Chilean universities [has launched the Learn Chile project to boost international students in the country](#) (see [website](#)).
- **ASEAN** Japanese institutions [are targeting the ASEAN group of countries as the Japanese MOE promotes linkages with Asian institutions](#).
- **Research Digest** IERN published research digests on the role international education plays [as an agent of soft power diplomacy](#) and [as a developmental tool](#).
- **NZ Governance** Massey's Prof Frank Sligo says [the NZ government's proposed changes to increase its influence on tertiary governance will discourage students from China](#).

## Regulatory Issues

- **Fewer Chinese Universities?** China announced plans in March to [turn 600 of its public universities into institutions of applied learning or polytechnics](#). It is an attempt to address the high unemployment rate of university graduates, while also training more technicians. We will explore that in more depth in a later report, as it has the potential to increase the supply of in-country vocational education, while also sparking interest in offshore partnerships.
- **Spanish Entry Exams** Spain will [no longer require international students entering higher education institutions to pass the country's competitive entrance exam](#). Instead universities will be responsible for creating their own admission exams.

- **Indian Access** India's new Education Minister wants the UK to [remove barriers that hinder Indian students' access to UK higher education](#), including recognising CSBE certificates, and making IELTS certificates valid for 3 years (currently 1 year).
- **Indian Doctors** The Medical Council of India [proposed scrapping almost a third of medical degree places](#) (16,000 out of 50,000) as part of a push to increase quality. Many colleges did not meet the Council's standards for staffing or facilities.
- **Corruption** UNESCO's International Institute for Educational Planning launched a [new website providing resources on ethics and corruption in education](#).
- **Finnish Fees** Finnish student leaders are pushing for [tuition fees to be kept at zero for international students](#). While that's a standard argument for student leaders, they do point to the poor results for other Scandinavian countries that introduced fees for international students.
- **Regional Integration** WENR explores [how the Bologna Process and similar models of regional academic integration have been implemented](#).
- **China** Six international universities [have been selected for the Sino-foreign Cooperative University Union](#), a new government advisory group on how lessons from Sino-foreign university collaborations can inform the development of China's higher education sector. The six foreign branch campuses (including Duke University and New York University) are unique in that the international partner has full academic control.

## Quality Assurance

**UK Testing Fraud** The Minister for Immigration and Security announced on 24 June that [“more than 29,000 invalid results and more than 19,000 questionable results” had been identified](#) among international students completing English language proficiency exams (the figures are interim and are likely to increase). All the exams were undertaken at Educational Testing Service (ETS) test centres, where major problems were uncovered by a [BBC Panorama programme](#) in Feb 2014. A joint investigation was subsequently done by UK Visas and Immigration and the National Crime Authority, with the following results.

- ETS' license to conduct tests for immigration purposes was suspended and was not renewed when it ended (see [change in Immigration Rules](#)).
- A criminal investigation has been launched into ETS Global Ltd (an ETS subsidiary) and related parties (arrests have been made).
- The government has started identifying those who may be in the country illegally, so they can be removed.
- Tax records have shown some students earning over £20,000 pa even though they are only supposed to work 20 hours/week. One student had worked 60 hours/week for 6 months. 290 students at a private college had worked last year, even though none were allowed to do so.
- The Tier 4 sponsor licenses of 57 private further education colleges have been suspended (two licenses have since been revoked, while a third has been surrendered), while Glyndwr University's license was also suspended. Two other universities (Bedfordshire and West London) may not sponsor new students pending investigations into whether they should be suspended too. Other universities might be suspended, and they have voluntarily chosen to suspend enrolments at London sub-campuses.
- The Quality Assurance Agency for Higher Education will [examine London branch campuses to check their quality](#).
- The Home Office released a [factsheet with extra details on the processes applying](#) – students already studying can continue to do so for the moment.

This is a classic story about greed in international education overcoming ethics. While the size of the regulatory action is unusual, the [BBC Panorama investigation](#) uncovered a rare level of corruption. The demand for fake credentials is so high that a major English language testing system was misused. Many, many providers were willing to accept the fake testing results, even though the mismatch between testing level and ability must have been evident in the students that they enrolled. The regulatory action should knock off the worst offenders, but the pressures to take shortcuts will still be there.

### Snippets

- **Australia** Sydney-based Williams Business College will be [the first institution denied re-registration by the Tertiary Education Quality and Standards Agency](#) on 4 Aug, due to serious concerns about financial viability. It has about 200 international students.
- **Portugal...** will implement a scheme [to accredit privately-operated Portuguese language schools](#). It will be run by the Instituto Camoes, which promotes Portuguese language and culture worldwide.
- **United States** The recently implemented [English Language Training Programs Act is making it difficult for new entrants to the US English language sector](#). Accreditation requires a 2-year teaching history, but I-20 visas can't be issued to international students without accreditation. The situation will help protect existing providers (and bid up their sale price).
- **More UK Fraud** The UK's Universities and Science Minister announced on 16 June that [£8m was paid in student loans to potentially bogus EU students](#), and is threatening legal action against private colleges involved.
- **Ireland** Minister for Education Ruairi Quinn plans to have [an "approved list" of ELT schools in the private sector that will be recognised as "bona fide" by the Irish Government](#). He wanted to get rid of those that wanted to provide an "illegal backdoor to the labour market".

## Transnational Education Regulation

**UAE** A [QAA inspection of 11 UK transnational education \(TNE\) providers operating in the United Arab Emirates](#) (40 pages), an area where more than 15,000 students studied towards UK qualifications in 2012-13 (there were [11 more reports](#), covering each campus). The report has an excellent overview of TNE in the UAE, with a special focus on UK TNE. The QAA identified three broad campus types.

- Comprehensive branch campuses (of which there were two) offered a similar experience to campuses in the UK, and had around 3,000 students.
- Administrative campuses had limited physical space and no permanent local academic staff. They had an average of 200 students.
- Collaborative provision generally involved major input by another partner, such as the provision of staff and teaching resources.

The concluding observations in the report were relatively minor. They suggested more work on developing a UK academic culture, better support for local staff, and better management of external examiner arrangements.

### Snippets

- **India** The new Indian government is apparently keen to [push a bill to allow foreign universities – the previous bill stalled](#).
- **Bangladesh...** will now [allow foreign universities \(or their representatives or joint venture initiatives\) to establish and operate branches or study centres](#). Rules have been published covering fees, space and teaching minima, and security bonds.



## National Scholarship and Research Schemes

**Russia...** finally approved its Global Education program on 20 June. The program will [pay the tuition of Russian students accepted for graduate study at select foreign universities](#) who agree to work for a Russian company for at least 3 years. 4.41 billion rubles will be allocated to 1,500 recipients from 2014-16 or up to US\$40,000 per participant per year. The funding will cover Master's-level study. Here's the [full announcement in Russian](#), but we haven't been able to find the full list of 150 universities in 25 countries that are eligible (but here's the [US university list](#)).

**Brazil** Science without Borders (or Ciência sem Fronteiras) is Brazil's major study abroad programme, aiming to send 101,000 students abroad from 2011-2015. The latest tranches were announced in May-June (See [NZ](#) and [Canadian](#) releases), but the big news in late June was an [extension of the programme beyond 2015](#). Brazilian President Dilma Rousseff announced that Phase 2 would involve another 100,000 scholarships, with greater focus on graduate students and Asia.

### Snippets

- **New Colombo Plan** Hong Kong, Singapore and Japan [are the most popular destinations for the first cohort of scholars under Australia's New Colombo study abroad plan](#).
- **NZ-India** NZ awarded [scholarships worth a total of NZ\\$150k to 15 Indian students to study postgraduate courses in skill shortage areas in Canterbury](#). Joint research grants worth NZ\$460k were announced by the NZ and Indian governments.
- **Canada...** announced \$40m over five years to fund 1,500 scholarships for Canadian students to study in developing Commonwealth countries through the [Queen Elizabeth II Diamond Scholarships Program](#). It will focus on doctoral and postdoctoral work.
- **UK-China Research** The UK and China [have agreed £53m of joint research programmes to tackle global issues](#).

## Immigration

- **United Kingdom** A survey by the Higher Education Policy Institute found [78% of Conservative candidates \(excluding sitting MPs\) think international students should be excluded from any target for reducing migration](#)
- **Australia** The [Australian Skilled Occupations List was updated](#). While accountants were proposed to be dropped, they have been kept, while chefs, bricklayers, and floor tillers were added from July 1. The Migration Regulations 1994 were also amended to clarify that a student visa applicant [must declare all family members in their application or before their student visa is granted](#). If they do not, a family member who later applied for a student visa on the basis of a family relationship with the original student will be ineligible for a visa.
- **Canada...** has released [the list of designated institutions for student visas](#). Under new regulations in effect from 1 June 2014, only students enrolled at designated institutions are eligible for Canadian study permits. Over 1,000 were listed (excluding primary and secondary schools, which are automatically designated).
- **Nova Scotia** International graduates from Canadian institutions [can now apply for permanent residency once they have a job offer from a Nova Scotia employer](#). Impressively, the media release has a quote from a student.
- **United States** The Department of Homeland Security [launched an enhanced 'Study in the States' website for international students](#).

## Trade Issues

- **Coursera...** has [lifted restrictions on access to its MOOCs by Iranian students](#) after consultation with the US government. The restrictions were put in place earlier this year to comply with US export control regulations, and continue to apply to Cuba, Syria, and Sudan, as well as Iran in relation to advanced STEM courses.
- **GATS** The ADB and OECD published an e-book on [trade policy in Asia, focusing on higher education and media services](#) (426 pages). We can't recommend, in good faith, that many readers wade through the 300 pages on higher education. If you are, however, interested in the technical aspects of trade in education services, this e-book is definitely for you.

## Political Risk

- **Russia-Ukraine** India has begun [an emergency evacuation of its citizens from Ukraine's conflict-stricken eastern region](#), primarily students (950 people went by train). Russian education agents believe [the unrest is likely to impact on both the Ukraine and Russia markets](#).
- **Thailand** The Thai Society at London's School of Oriental and African Studies [was warned by the Thai embassy that the timing of a planned seminar was "inappropriate"](#), but the student run-Thai Society continued with the event.
- **Azerbaijan** An Azerbaijani state owned enterprise is [shutting down private schools associated with Turkish \(but US-based\) Islamic scholar Fethullah Gülen](#). Gülen's Turkish schools have also been shut down by the Turkish government – his movement is a rival to the Turkish governing party.



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