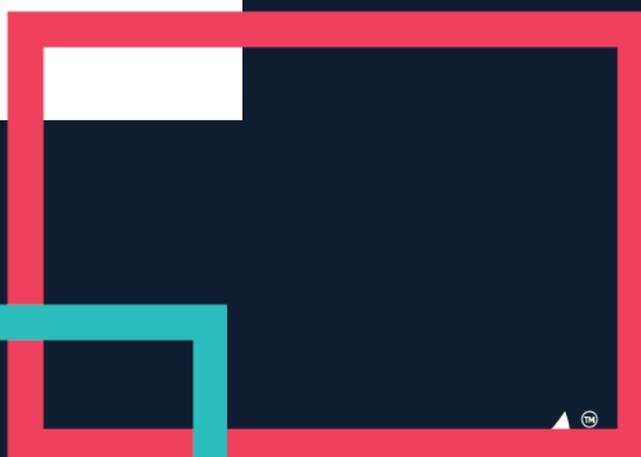
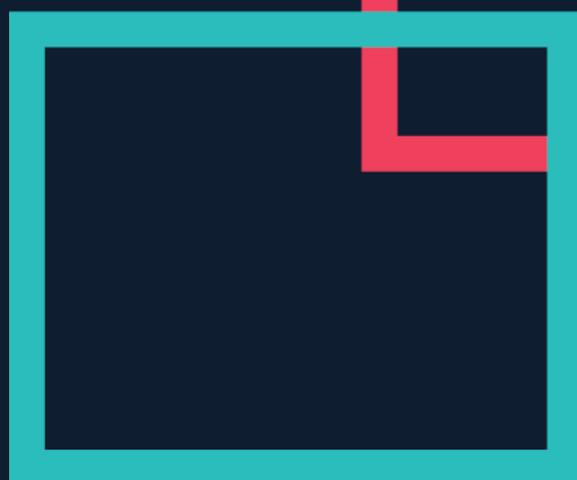




# International Education Scanning Report

Sep 2014



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### Report Purpose

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).

## September 2014 Executive Summary

### Markets

1. The OECD's Education at a Glance was released, providing the most detailed annual update of international education figures. It showed slowing growth from 2011 to 2012, as well as a wealth of comparative data.
2. A UK report noted the risks to UK postgraduate education as traditional sources of international postgraduate students, such as India, declined. There had also been an 87% decline from 2011 to 2013 in the number of students shifting into a work visa after study.
3. A report on how to increase the University of Oslo's global visibility provides a good case study for other universities. The report is not perfect, but it is a worthwhile skim.
4. HSBC research on parents' attitudes to education in 15 countries is a useful tool for marketers.
5. Tunisia was the latest country to propose a major project involving international education. We may hear a lot more about Tunisia Economic City, a US\$50b project.
6. Several reports explored the value of agents. A UK-based study found that most educators felt that agents added value, notwithstanding some problems. On the other hand, two US-based studies demonstrated much more scepticism, with fears around corrupt practices, and an antipathy to commission-based marketing.
7. A mystery shopping experience exposed some poor response times and practices relating to email enquiries.
8. A major study on the impact of Erasmus was released, including surveys of 80,000 people. It will have value to anyone promoting study abroad schemes, or international study in general.

### Government

9. India and the UK were at odds over the recognition of UK one-year master's degrees and Indian school leaver certificates.
10. The Irish government released a report on the closures of five colleges enrolling non-European Economic Area (IEEA) students, with a focus on how the local industry pulled together to help students. Another report detailed sweeping reforms to regulation that will sharply limit the provision of some types of international education.
11. An OECD report on NZ migration policy called for extra monitoring of international students work conditions, and their impact on low-skilled locals' employment.
12. The UK immigration area remained very busy, with wider political debates, new regulations, and continued suspensions/closures of providers that failed to meet immigration requirements.

## Markets

### Market Size & Value

**Education at a Glance** The OECD released [‘Education at a Glance 2014: OECD Indicators’](#) (570 pages), featuring extensive data on education systems in the OECD’s 34 member countries and other partner countries. The most relevant section is *Indicator C4 – Who studies abroad and where?* (pp.342-361). Some key parts are summarised below.

- **The global focus provides a better overview of the international education sector than most English-language sources, which often focus on Anglophone destination countries. The data is the most comprehensive global collection, but it is out of date, generally covering 2012 data.**
- **The number of foreign students worldwide grew by 3% from 2011 to 2012, after growth of 4% and 12% in the previous 2 years.**
- **International students made up more than 15% of tertiary education enrolments in Australia, Austria, Luxembourg, NZ, Switzerland and the UK. They made up more than 30% of students in advanced research programmes in Australia, Belgium, Luxembourg, The Netherlands, NZ, Switzerland and the UK. The report has many more examples of how enrolments differ by country, qualification type and subject, and the balance of inflows and outflows for each country.**
- **There are excellent articles within the C4 section on tuition fee policies, languages of instruction, and countries/regions of origin/destination.**

Education at a Glance is a very useful reference work, both for its statistics and policy analysis.

**UK Universities** UK published a report [on trends in non-EU international student recruitment to UK universities](#) and their overseas competitors (44 pages, [media release](#)). This latest report complements one released in August 2014 arguing that international students should be excluded from any UK net migration target. Universities UK associated recent immigration policy changes and messages with a decline in key markets, such as South Asia. They then compared that to a more supportive environment for education providers in the US, Australia, Canada, NZ and Germany. Universities UK called for the government to aim for international student growth, send a welcoming message, exclude students from a net migration target, and enhance post-study work opportunities.

The report is an interesting read, but some new and notable details included:

- **while Chinese, Hong Kong and Malaysian students have often replaced students from India, Pakistan and Nigeria in recent years, their enrolment patterns differ – the growing markets are more likely to favour undergraduate study, while the declining markets are more likely to favour taught postgraduate and STEM courses;**
- **some STEM courses, such as engineering or computer science, rely greatly on international enrolments at postgraduate level, and have been significantly affected by recent enrolment declines; and**

- the number of non-European Economic Area students switching into a work visa after study declined 87% from 2011 to 2013 – in addition, those markets most desiring post-study work opportunities have had the highest declines in student numbers.

#### Snippets

- Chinese High Schoolers Voice of America noted that the number of [Chinese high school students in the US was up 50 times from 2006](#).
- Scotland The number of fee-paying students from the rest of the UK accepted by Scottish universities [rose by more than 10% between 2013 and 2014 \(from 5,300 to 5,870\)](#) – a side-effect of high UK fees.
- Kuwait The number of students from Kuwait in the US [has increased by over 10% every year since 2007](#), which WENR largely attributes to government-funded scholarship programmes.
- Germany Indian students studying in Germany [increased by 200% since 2008-09](#), but the total was still under 10,000.
- US Grad Schools The Council of Graduate Schools [released its latest annual report on trends in US graduate enrolments \(122-page report\)](#). The report is part of a longstanding reference series and covers the 2003-2013 period, rather than the more up to date CGS surveys that we usually report. Foreign student enrolments were up 11.5% from 2012-2013, offsetting a 0.9% decline in domestic enrolments.
- Sweden The number of Indian students in Sweden [increased from 750 in 2012 to 1,300 in 2013](#).

## Market Events & Commentary

**University of Oslo** An international strategic advisory board appointed by the University of Oslo two years ago released its report [‘Build a Ladder to the Stars’](#) (28 pages) on how to increase the University’s global visibility as a leading university by 2020. We wouldn’t normally cover such strategies, but the board’s membership was impressive, and the University of Oslo, as the leading university in a small country, has parallels to other universities.

The advisory board found that the University’s existing strategy failed to set clear priorities. In response, the advisory board recommended a series of changes – some a little vague, but with a common emphasis of becoming more performance-oriented, outward looking and focused.

**Destination Costs** The major bank HSBC released its [first report on The Value of Education](#), (28 pages), based on a survey of 4,592 parents in 15 countries, along with the costs of university study and living costs in those countries .

- The main report is not specifically about international education, but the views of parents, and the differences in them between countries, are of value to international education marketers. Topics covered include willingness to pay for education, level of qualification desired for children, extent of forward planning, and expectations from university education. A section on international education (pp.20-23) covered parents’ willingness to send their children overseas, the benefits they expect and the best regarded countries.

- The cost data was a simple table, listing Australia as the most expensive and India as the least expensive.

### Snippets

- South Africa 1,682 international students in South Africa participated in a [survey of their experiences](#).
- Market Snapshots... covered the [United Arab Emirates](#), [New Zealand universities](#), [Ireland](#), [Spanish language schools in Spain](#), [Kazakhstan](#), and [Laos](#),
- India Boston College's Prof Philip Altbach, a leading international education researcher, explored the reasons why [Indian postgraduate students increasingly choose to study abroad](#).
- Chinese Students A new study found that [students of Chinese background in Australian schools do better in maths than their counterparts in Shanghai](#). The research also covered NZ. The article seemed to exaggerate the significance of the findings about the relative value of different systems.
- Strike in Canada An ongoing strike by British Columbia's public school teachers [caused concerns about the impact on British Columbia's international reputation as a student destination](#).
- Japan Japanese universities [are increasingly offering classes taught in English](#).
- EAIE Conference 5,000 delegates from 90 countries [attended the European Association for International Education's \(EAIE\) 26<sup>th</sup> annual conference](#). An EAIE survey was released at the event, exploring the [focus, activities, and knowledge/skill needs of 2,500+ European international education practitioners](#).
- English Testing EF Education First plans to [launch a free online English language exam to rival established brands like TOEFL and IELTS](#). They are looking to run a free mass-market option, and then sell the test to institutions and governments that could control how the exams were delivered.
- Australia The University of Queensland threatened to [prioritise international students over domestic students if the federal government doesn't continue with plans to deregulate tertiary education](#).
- Email Scam A US IT security company found that [email addresses \(with passwords\) from top universities were being sold in China](#), with buyers using them to access student discounts, software licenses and library resources.

## Transnational Education

**Tunisia...** unveiled [Tunisia Economic City](#), a huge economic and urban development project that will [house research and science, university and medical 'cities' including branches of foreign universities](#). It will apparently cost US\$50bn and provide 250,000 jobs once completed in 15 years. It could become a significant player, but it could equally fail to meet its targets.

### Snippets

- Academic Freedom A [debate at Wellesley College](#) in the US has explored the issues around academic freedom when considering international agreements. A partnership with Peking University was the subject of the debate, which resulted in a new, and more detailed, approval process for partnerships.
- Russia... saw the [opening of the first German-Russian joint university in the Russian Republic of Tatarstan](#), and [an agreement with China for a Russo-Chinese International University](#) in Shenzhen, China.
- Hub Financing Jane Knight wrote a useful 2-page article summarising [how 6 education hubs are financed](#) – the proportion of public funding varied greatly.
- South Korea Belgium's Ghent University [became the fourth foreign university to open a branch in South Korea](#), following the University of Utah. The Incheon Free Economic Zone, where they are based, [wants to become the centre of education in East Asia](#).
- Joint Institute The University of California, Berkeley and Tsinghua University [signed an agreement to launch a joint research institute based in Tsinghua's South China campus](#).
- China-Algeria China and Algeria have signed an [MOU over higher education co-operation](#).
- Japan... may [set up branch campuses of three universities in Malaysia](#).
- Canada-Mexico MOU The Association of Universities and Colleges of Canada (AUCC) and its Mexican counterpart [renewed their MOU for a further 5 years](#).
- TAFE NSW... signed [agreements with two Chinese universities for the recognition of diploma qualifications for degree credit in China](#).
- Cyprus The University of Central Lancashire's [Cyprus campus project is under scrutiny after it was revealed it received a £16m investment from the pension fund of Cyprus' state telecoms firm](#), which is being investigated over alleged kickbacks and corruption in a separate land deal.
- Confucius Institute The University of Chicago [has failed to renew its agreement to host a Confucius Institute](#). More than 100 faculty members called for the closure, citing academic freedom concerns.
- China The Atlantic reports on [Chinese universities' efforts to replicate the look of their Ivy League counterparts](#), including at branches of Western universities.

## MOOCs

- The British Council... [launched 'Exploring English: Language and Culture'](#), the world's biggest English MOOC with over 70,000 participants.

## Recruitment

**Working with Agents** The OBHE published [a report on the use of agents in international education](#), drawing on i-graduate data and a survey of 181 educational institutions. They found general satisfaction with agents, notwithstanding that there were some poor agents, which could be dealt with via regulation. The full report is available [here](#) with an OBHE membership or for a £325 fee.

A 2014 Survey of College and University Admission Directors (US-based) [showed that international students remain an important target group](#), but are not the highest priority group for most institutions. Only 19% of institutions paid commission to agents. While only 14% felt that fabricated applications were a problem at their institutions, 56% felt that paid agents played a role in helping applicants to fabricate applications (public doctoral institutions were more likely to believe that agents played such a role, and were, in turn, less likely to pay commission to agents).

The National Association for College Admission Counseling (NACAC) published [“International Student Recruitment Agencies: A Guide for Schools, Colleges and Universities”](#) (24 pages). The report described why many US institutions have concerns about commission-based payments to agents, and explored how they could manage such arrangements. A key recommendation was to notify students of any commission arrangements. It is a useful guide that will be of interest to institutions in other countries, but sets out a strict process.

**Mystery Shopping** StudyPortals and the British Council conducted [a mystery shopper style assessment of the recruitment process of 445 of the world’s top ranked institutions](#) (15 pages). The study was limited to those offering programmes in English.

- **UK, Irish, Scandinavian and Benelux institutions performed best.**
- **57% of the institutions replied to enquiries within 1 day.**
- **21% of institutions failed to respond at all to student enquiries. 68% of institutions sent a reply, but then sent no follow-up emails.**

### Snippets

- **Study Centres Study Travel Magazine [on the attraction of international study centres at secondary schools](#).**
- **Language School Portal Studypartals.com [launched a directory website for the language school sector](#) at [www.LanguageLearningPortal.com](http://www.LanguageLearningPortal.com).**
- **Hotcourses... launched [a new course search service](#) to match students with higher education institutions.**
- **South Korea The South Korean government [held an educational expo in the Philippines](#), a small supplier of students to South Korea, as part of the [ambitious South Korea 2020 Project](#) to boost student numbers.**
- **United Kingdom The British strategy consultancy TKP found that [onshore international students in the UK were twice as likely to be accepted at British higher education institutions as those applying from overseas](#).**

- English Australia... was [“ramping up” efforts to engage with education agents and launching a new Partner Agency Program](#) after a survey revealed more than 1 in 3 agents were unfamiliar with the organisation.

## Study Pathways

- Cambridge Education Group... aimed to develop [the largest pathway programme for international students hoping to enter university in the US](#), through a partnership with the State University of New York (SUNY).

## Retention & Achievement

- Chinese Students WholeRen Education, an agent, explored [why Chinese students were expelled by US institutions](#) (20 pages), drawing upon their own database. The main reason was low marks. A psychiatrist wrote on [four unique challenges facing Chinese students](#) in America (international or domestic). A Stanford Master’s paper was written [on the choices, expectations and experiences of international students in Chinese higher education](#). It was based on a survey of 1,674 foreign students in Beijing.
- NAFSA... explored how US institutions [are going about retaining international students](#).
- Student Integration The British Council released the report [“Integration of International Students: A UK Perspective”](#) (16 pages), based on a survey of 2,632 UK-based students. Unsurprisingly, those with international student friends had more positive views of such students. The research is interesting, but is of limited depth.
- UK Experience The UK International Education Council published a Jun 2014 [working group report](#) setting out practical suggestions for improving the international student experience (5 pages). It covered pre-arrival, accommodation, academic satisfaction, employment and code of practice issues.

## Post-Study Outcomes

- Global Leaders 1 in 10 current Heads of State [completed their higher education in the UK](#), according to [new British Council research](#).

## Study Abroad

**Erasmus Impact Study** [The Erasmus Impact Study](#) (227 pages) explored how student mobility affected students’ skills and employability. Staff mobility and the internationalisation of institutions were also covered. The respondents from 34 countries included 57,000 students, 19,000 alumni and

5,000 institutional staff, 1,000 institutions and 650 employers. Focus groups complemented the major surveys. Some key findings are described below.

- Erasmus participants developed better employability skills than 70% of all students – they were better placed even before they left, but increased their lead after their foreign experience.
- Former Erasmus participants are half as likely to experience long-term unemployment compared to those who do not go abroad.
- Erasmus alumni were more likely to switch employer, live abroad (or envisage it), or have a life partner of a different nationality than non-alumni.
- Non-participants were less likely to have parents with a degree. Those who chose not to go abroad most often cited cost and family/relationships reasons.
- A section covering the impact of staff and student mobility on institutions (pp.137-184) is of particular interest, as few studies look into those areas in such depth.

It is an important study that would be a valuable read for anyone promoting study abroad experiences. Erasmus is the largest study abroad programme, and this is a very detailed, and rigorous, study.

#### Snippets

- Go International The UK Government [launched the “Go International” website](#) as part of the UK Strategy for Outward Mobility (see [the website](#)).
- Non-Traditional Students NAFSA explored [the challenges of funding education abroad for non-traditional students](#), and the related barriers that need to be addressed. An op-ed writer also argued that [Historically Black Colleges and Universities \(HBCUs\) need to invest in education abroad](#), while another called for more minority students from the US to [study Mandarin and study abroad in China](#).
- Indonesia The number of [Australian students studying in Indonesia was the highest it has been since 2000](#) (but it was still only 100).

## Rankings & Indices

- QS Rankings QS released its [World University Rankings for 2014/15](#) ([The PIE News](#), [University World News](#)).
- Norway A government-commissioned study of the placement of Norwegian universities in global rankings [concluded that the rankings are too subjective and based on dubious data to be of use](#). Still, there were recommendations to improve underlying education and research quality, as it was noted that Norwegian researchers had lower research productivity than those in other Nordic countries.
- Middle East US News, QS Intelligence Unit, and Times Higher Education were all [developing university rankings for the Middle East and North Africa \(MENA\) region](#). Al-Fanar Media commented [on Arab university positions in the latest QS rankings](#)



- EL Gazette Rankings EL Gazette [published a list of the top UK language centres](#), with independent schools outperforming chain schools.
- India... was working on [a ranking system primarily for Indian institutions](#).

## Government

### Overarching Strategies

- Canada Inside Higher Ed explored [Canada's increasingly strategic approach to international student recruitment](#). It's a long article, drawing on a range of perspectives, and with frequent comparisons to the US (where Inside Higher Ed is based).
- Australia Some Australians were still frustrated that the government [had not yet released its response to the Feb 2013 Chaney Report, which set out a 5-year strategy for the international education sector](#). Keith Suter, VP of International Student Experience Australia, called for [Australia to have a Minister for International Education](#).

### Regulatory Issues

**India-UK Dispute** India [may reconsider its 2013 commitment to recognise one-year master's degrees awarded in the UK](#) if British universities do not reciprocate by accepting Indian Class XII certificates held by undergraduate applicants. India recognised the 1-year master's degrees on the basis that the Indian UGC developed a 6-month bridging programme, but the programme has not been developed. The dispute is a symptom of the UK's worsening market share for Indian students heading abroad – India is pushing its case harder as a result.

#### Snippets

- Malaysia... will make it [compulsory for students at public universities to pass an English course](#).
- New Zealand... was [developing an International Students Support Framework](#) to coordinate government support and guidance across agencies (and with others).
- Cyprus... planned to [address concerns that students were leaving their studies to work illegally](#). They may limit international students' studies to 7 years, impose English language standards, and require tighter attendance. There are alleged instances of students being recruited with the promise of high-paying jobs.
- Australia The Australian Qualifications Framework (AQF) [consulted on two projects to align the AQF with equivalent frameworks in New Zealand and Europe](#).
- Australia English Australia published [its submission to the Post-Implementation Review \(PIR\) of the establishment of universal Tuition Protection Service \(TPS\)](#) (4 pages). They felt that the system was an improvement, but sought greater input and lower levies.

## Quality Assurance

**Irish Reforms...** will [reform student immigration and international education regulations](#) (13 pages), after recent closures and scandals at private providers (see next story for details). The underlying issue was that some providers were allegedly giving cover to those who wanted to work illegally in Ireland. Those providers tended to target non-European Economic Area students, have very low fees, not offer quality-assured programmes, not have fee protection mechanisms, and have poor attendance and completion rates. In response, the Irish government proposed to:

- **create a new register of approved programmes, based on those with existing quality assurance, and limited to higher education, English language and foundation programmes;**
- **require immigration authorities to vet any proposed programme providers;**
- **require programme providers to successfully deliver to Irish and EEA students before enrolling non-EEA students; and**
- **only allow International Education mark providers to join the register, once that Mark is established.**

Other measures include a new inspection and compliance regime (which may be covered by a levy covering promotion as well), the tightening of the student work regime (limiting full-time work to specific periods aligned with the traditional academic year), and financial protection issues. Some vocational education training for foreign students may be allowed for some corporate trainers.

Ireland is reacting to some poorly run colleges (and very weak regulation), but they do run the risk of severely damaging providers outside of the traditional higher education, English and foundation sectors. An English language provider representative [praised the approach](#), but the policy looks to be an overreaction.

**Irish Investigation** The reforms in the previous story arose from the closures of private colleges, which were the [subject of a taskforce report](#) (17 pages). 5 colleges closed, affecting about 2,000 non-EEA students. Government agencies, students groups and other providers worked collaboratively to develop pathways for the colleges' students.

### *Snippets*

- **Agency MOU** The UK's Quality Assurance Agency for Higher Education (QAA) [signed an MOU with its Malaysian counterpart](#).

## National Scholarship & Research Schemes

- **Australia** The Australian Government announced [a new AUS\\$16.5m student mobility programme to benefit more than 5,000 Australian students](#). It complemented the \$100m New Colombo Plan, and was not limited to Asia.
- **Newton Partnership** The UK and South African governments [announced a US\\$46m investment in the UK-South Africa Newton Fund](#), a new research and training

partnership. The UK and Egyptian governments announced a [£20m Newton-Mosharafa Fund for joint research projects](#).

- South Korea... was [expanding its Global Korea Scholarships](#) to attract elite students from ASEAN.
- Science Without Borders The UK Higher Education International Unit [apologised for an email “sent in error” to about 80 Brazilian students participating in the Science Without Borders programme at the University of Southampton](#). The email warned students that they were underperforming, and that Southampton could withdraw from the programme. Meanwhile, Universities Australia [was hopeful Brazil would extend its Science Without Borders programme to include master’s students](#).
- Horizon 2020 The EU has [partially readmitted Switzerland to the Horizon 2020 research programme](#). It is still barred from participating under the second (Industrial Leadership) and third (Societal Challenges) pillars of the scheme.
- German/Australian Research Universities Australia and the German Academic Exchange Service (DAAD) were [working towards a new MOU to form a joint science and research exchange agreement](#).

## Immigration

**NZ** An [OECD report on the recruitment of immigrant workers](#) (150 pages) was released on Jul 2014. It recommended further monitoring of the impact of international students on the employment prospects of low-skilled New Zealanders, and better monitoring of students’ working conditions. It proposed higher migration points for those with greater mastery of English, and abolishing or lowering the bonus points now given for NZ qualifications. The OECD also proposed better information for international students about NZ labour needs and work opportunities.

**UK** Immigration remains a busy area in the UK, with tougher regulation, visa changes, and debate on migrant caps.

- Times Higher Education (THE) reported one source estimating that [35 to 40 institutions could be affected by a new 10% threshold for visa refusal rates](#) after which licenses to recruit may be lost (the rate was 20%).
- The London School of Business and Finance (LSBF) [had its Highly Trusted Status \(HTS\) reinstated following its suspension in June](#), and can now resume recruitment of international students. 34 colleges remained suspended, while 28 had their licenses revoked, or surrendered them. Glyndwr University was [granted more time to appeal against the suspension of its visa license](#).
- The UK government is [planning further changes to its Tier 4 visa system](#), with 15 short-term visitor visa categories to be consolidated into 3, and the possibility of a cheaper Premium Service for smaller providers.
- Regulations requiring UK landlords to check the immigration status of tenants [started to take effect](#). (The French, on the other hand, promoted a scheme to [help students guarantee their rent deposit](#).)

- New universities and science minister Greg Clark [declined to support calls to exclude university students from the net migrant count](#), but the Labour Party confirmed that [it would do so](#).
- The UK International Education Council published a [working group report](#) from early 2014, setting out practical suggestions for improving immigration policy and operations to help with student recruitment.

### Snippets

- New Zealand... introduced an online system for foreign students and tourists to [apply for and track student and working holiday visas](#). Electronic visas, rather than stamped passports, would start in 2015.
- Australia International Education Association executive director Phil Honeywood says [increasing visa charges could deter international students](#). Australian charges are already high in international terms.

## Political Risk

- Ebola US institutions were [advised to take extra precautions against spreading Ebola](#), while Russian universities [extended the summer break for students from Ebola-hit countries for two months](#).
- SAT Test The US College Board's introduction of historical documents such as the US Declaration of Independence into part of the SAT college entry test [has been criticised by parts of the Chinese media for imposing American values](#).
- Chinese Donations Foreign Policy magazine argued that [wealthy Chinese were motivated to donate to American, rather than Chinese, colleges by the corruption found in many Chinese institutions](#).
- Ukraine About 350 Nigerian students [were trapped in Ukraine's war-torn regions of Donetsk and Lugansk](#).
- Scottish Independence China News Service looked at [the impact Scottish independence might have on its attractiveness to Chinese students](#) – many students in an informal survey said they might not have come.
- Egypt... [delayed the start of its academic year by two weeks](#), officially because university dorms were unprepared to accommodate students.
- Syria. Efforts were being made to [support the higher education of Syrian Refugees](#).

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