

CBBC China Mission 2005 Report

(24th October – 4th November 05) - Sarah Wang

Background

The China-Britain Business Council (CBBC) & Business Link Somerset – Education and Training Mission has brought together 38 education and training organisations, including 8 English UK member schools.

During the 12 day trip (24th October – 4th November 05), we visited Beijing, Changsha (capital of Hunan province) and Wuhan (capital of Hubei province). I had opportunities to meet UK Embassy and British Council staff, agents, Chinese government officials, education professionals, schools and universities in these cities.

This report covers:

- ELT market in China overview
- Challenges for the UK education and ELT providers
- Opportunities
- Agent contacts
- Education statistics for Beijing, Hunan and Hubei

1. Market Overview

1.1 The outlook

It was my first visit to Beijing in 5 years. My memories were soon altered by the amount of new modern buildings and cars on the road.

We heard from UKTI that 27,000 new cars are registered each month in Beijing. The increased number of private cars is one of the indications of the growth of personal wealth. There were an estimated 236,000 millionaires in China in 2003 and the number is growing 12% each year.

From the familiar logos of multi-international companies on skyscrapers and many more foreigners on the streets, it is clear to see that China is getting actively involved in the world. English is the most common foreign language used in business communications. Fuelled by many forthcoming international events especially the Olympics (in Beijing 2008) and World Expo (in Shanghai 2010), there is a greater need for people having foreign language skills. With the encouragement from central government, enthusiasm for English language learning has become phenomenal throughout the country.

- English teaching was extended to primary school grade 3 (10 years old) in 2000. In some big cities, ELT starts from the first year of primary and even kindergarten.
- English is a requirement in career progression for most professionals.
- English is a required subject in graduate and postgraduate exams.
- English training is provided for people in service sectors such as taxi drivers and policemen.

1.2 Private ELT in China

It is reported that there are now nearly 60,000 English language centres in China. The total value of the ELT market is RMB15 billion (GBP1 billion) and this is likely to double over the next 5 years.

Private ELT training is mainly segmented in 3 areas:

a. Exam preparation

Schools focus on preparing students to take language examinations such as IELTS and TOEFL. This year 150,000 people are expected to take IELTS exams.

The market leaders in this sector are New Oriental schools, Global IELTS and Oxford English.

- b. General English training for adults
Training is mainly designed for those who seek career progression or need English in their business communications. It emphasises quick results and practical applications. EF, Walstreet and Li Yang Crazy English are the key players in this sector.
- c. Junior groups
Education is the top priority 'investment' for all single-child families. Parents are expecting their children to succeed academically as the best route to good jobs, and are dissatisfied with the level of English education from the traditional education system. Most children are given after-school lessons in private institutions or by private tutors. Cambridge certificate courses became very popular in recent years. 160,000 students took the course and exam in September this year alone.

2. UK education and ELT market in China

2.1 General trend

British Council reported 60,000 Chinese students came to study in the UK in 2003/2004. 48,175 were at HE, 7,110 at FE, 975 are at independent colleges. However, the very rapid growth in numbers seen in recent years has hailed.

The positive side is that UK remains the top choice for Chinese students according to a survey conducted by Beijing Youth newspaper. Visa approval rates have significantly improved this year with 72% approval rate.

2.2 Visas

Since February 2005, the British Embassy has introduced a network of 12 visa application centres across the country (including Beijing, Guangzhou, Shanghai, Shenyang, Shenzhen, Wuhan, Chengdu, Chongqing, Hangzhou, Jinan, Nanjing, and Fuzhou). These centres perform a number of routine administrative tasks on behalf of the British Embassy, including receipt and preparation of applications, fee collection, data input and delivery/return to/from the relevant Embassy or Consulate.

Under the expanded system, applicants no longer submit their applications directly to the Embassy or Consulates, but travel to their nearest Visa Application Centre and lodge their application. The vast majority of decisions are made without the need for an interview. The quality of documents is vital in successful visa applications. Therefore increasingly more students (over 50%) now seek professional services from agents. The Visa Application centres provide guidance on and pre-screen documentation. These have helped the improve quality of documentation and subsequently a higher visa approval rate.

During the meeting with Nicole Davison (H.M Consul of the British Embassy), she said the new system has effectively saved BE's resources so that they can work on more critical areas. Forgery is still serious among visa applications. They even found a case of forging visa refusal letters in order to claim deposit money from UK schools. The Embassy has increased its staff input in field investigations such as telephone checking and home visits.

Views from agents towards the visa situation were quite different. Most of them do not agree the visa situation has been easier. Particular problems are around 6-months financial evidence. There are cases that applicants from families having undeclared income or personal resources (which are very common in China) failed to convince the visa officials.

2.3 The challenge for UK ELT providers

For UK ELT providers, the Chinese market appears to be tougher than ever. English UK statistics for the last 3 quarters (Jan – Sept) showed 43% decrease of total student weeks for

Chinese students comparing same period with last year or 70% decrease comparing to 2003. Some private language schools reported 80% drop in number of Chinese students. The reasons include the following factors:

- a) Mass expansion of in-country supply from private centres. EF for example has established 80 centres in China.
- b) Preference for language programmes in conjunction with degree courses from UK universities
- c) High cost of courses in private language schools
- d) High risk of not getting UK visa, especially for language learners who have no further study plans in the UK.

3. Opportunities

The impression is that overseas education in China has shifted from a sellers market to a buyers market. As the market becomes mature and more diversified, the traditional methods of student recruitment in China are not generating the same results.

The market however presents many new opportunities. Nicole de Lalouviere (at the British Council, also the former Chair of BASELT) commented that UK ELT educators must identify the opportunities and adapt themselves to the market needs.

The following opportunities for UK ELT educators were identified during my visit.

3.1 Teacher training

a. Overseas teacher training

In cities like Beijing, Shanghai, Shenzhen and Guangzhou, bilingual courses are introduced from primary level in many schools. This has created higher demands for training, re-training teachers and importing foreign teachers. Shenzhen city for example has sent 432 teachers abroad and employed 578 foreign teachers during the past 3 years to meet the demands. Hubei province has been sending 80 teachers each year to the UK.

There is no central planning for overseas training programmes. Local education bureaus and sometimes individual schools can make decisions on schools, number of teachers and budget for overseas training. The choice of foreign schools is largely based on personal contacts and recommendations, rather than reputations. Wuhan University of Technology sends 10 teachers a year to universities in the UK such as Manchester.

Mr. Yang, the director of State Administration of Foreign Experts Affairs I met in Beijing talked about the lack of planning and coordination in overseas teacher training. One of the problems is that Chinese teachers and schools are not able to access the best resources the country provides. He is hoping to establish partnerships with foreign associations such as English UK to make the exchange smoother.

- b. In-country teacher training: the current Chinese English teachers supply can only satisfy 30% market demands. The majority of Chinese teachers rely on in-country training. There are demands for foreign involvement in training teachers. Distance learning courses are expected to have huge growth in the near future.

3.2 Junior programmes

Summer camps and vocational programmes are likely to increase. Because:

- the cost of travelling to the UK becomes affordable for many more families
- parents see vocational programmes as an alternative way for their children to gain overseas experience
- positive media reports on children who have been abroad such as better language skills, more independent and better communications
- Schools are encouraged by the government to increase international exchanges for their students.

There are various channels involved in organising the summer camps. I have received enquires from agents, individual schools, trade institutes and teachers about summer camps programmes in the UK.

3.3 Vocational training

Vocational education is at the top of China's education agenda. The plan is ambitious. Just as I left China, news on CCTV (China Central TV) announced the central government plan to invest RMB10 billion (GBP0.6 billion) in vocational education. In 2006, student enrolments for vocational secondary schools will be increased from 6 million to 7 million. There are various foreign co-operations in the vocational sector, like Wuhan University of Technology is running HND programmes in corporate with SQA.

3.4 Professional training

Most professional training providers (in the areas of oil industry, legal, finance and business) in the mission reported high training demands from companies, institutions and government departments. I had an interesting meeting with several Chinese professors. They also commented on the needs for training in private companies. However UK training programmes are not widely recognised and people are generally not aware of what resources the UK can provide.

3.5 Certificate course

There are interests in combining existing training programmes with foreign certifications. One agent for example is interested to introduce an English language certificate course to primary and secondary schools with which they affiliate. The schools will add the certificate courses on top of their current English lessons. He is seeking an UK partner to develop such courses as suits the Chinese students and schools.

3.6 Cultural exchange

There are interests in short-term language plus travel programmes for adults and professionals.

3.7 Government programmes

British Council indicated specific training needs for government projects and major international events such as the Olympics and Shanghai World Expo.

4. Agents

The government has recently released a new list of approved agents in November this year. The total number of licensed agents in China has reached 390.

I visited 9 agents during the mission and their details are as follows:

- 1) Beijing JJL overseas education consulting & service co., ltd.**
The largest agent in Beijing that sends over 2000 students abroad each year. UK is the biggest part of their business and about 800 students are sent to UK universities each year.
- 2) Beijing Century Bole Study Service company**
Been voted as the best agent of 2005. Send approx. 300 students a year to the UK, mainly on postgraduate courses. They are interested to develop summer camp and short training courses for adults in the near future.
- 3) Fe He Yi Xiang Education Consultants (Beijing) Co., Ltd**
Sent 100 students a year to the UK before 2004. The business has greatly reduced due to visa difficulties last year. The company shifted its focus to Australia and US and other in-country language programmes.
- 4) Worldwide Education Foundation**
Mainly focused on the US and Australia market. They claimed to have 80% market share of applications to the US in Beijing.
- 5) China Centre for International Educational Exchange**
It is under the administration of China Education Association for International Exchange, which is affiliated to the Ministry of Education. The company currently sends 40-50

students to the UK.

6) Beijing Global Education Centre / Beijing Wan-ji Education Consulting Company Limited

One of the first agents to start promoting UK education in Beijing (owns the web site - www.edu-in-uk.com). Sending over 100 students to the UK a year.

7) Hubei Zhongqi International Cooperation Education and Training Centre

The centre is a department of Wuhan University of Technology responsible for international co-operation. They mainly provide services to students in the university itself which is around 46,000.

8) Hubei Provincial Talent Development Exchange Centre

A young but ambitious agent with high level of marketing input in the region. Currently send 60-80 students a year to the UK.

9) International Education Exchange Department, Hubei provincial foreign affairs service centre

Send approx. 30 students to the UK a year.

5. Education statistics

5.1 Beijing

- Population (2003) - approx. 7.5 million
- Area: 16,808 km²
- GDP (2003) - 366.3 billion RMB
- Gross domestic product (in 2004) was 428.3 billion RMB, a real increase of 13.2% from the previous year.
- Student population: approx. 2.5 million
- Primary schools: 1652
- Junior middle schools: 434
- Senior middle schools: 329
- Vocational schools: 20
- Higher Education institutions: 118

5.2 Hubei province

- Capital city: Wuhan
- Population: 60 million
- Area: 189,500 km²
- Hubei's economy ranks 10th in the country
- Nominal GDP for 2003 was 540.2 billion RMB (65.2 billion USD)
- GDP per capita (2003) was 9000 RMB (1087 USD).
- Student population 12 million
- Primary schools: 14,085
- Junior middle schools: 2,651
- Senior middle schools: 631
- Vocational schools: 487
- Higher Education institutions: 85

5.3 Hunan province

- Capital city: Changsha
- Population (2002) – 66 million
- Area: 211,800 km²
- Nominal GDP for 2003 was 463.9 billion RMB (56 billion USD.)
- GDP per capita - 6960 RMB (840 USD).
- Student population: 11 million
- Primary schools: 24673
- Junior middle schools: 3924
- Senior middle schools: 774
- Vocational schools: 668
- Higher Education institutions: 85