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Our **Industry Journal** offers in-depth analysis of key trends and recent changes in China's growing higher education sector and provides up-to-date information about changes in the Chinese government's education policy. It provides access to the necessary information to enable your institution to achieve long-term and sustainable success in China.

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- **University Senior Management** looking for an increased level of sustainability within their China engagement strategies;
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- **New MoE-approved Joint Programs**
 - By Student Intake
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DO THE BENEFITS OF MOE-APPROVED JOINT PROGRAMS OUTWEIGH THE DRAWBACKS?

The number of joint programs between Chinese and overseas universities has increased markedly over the past two decades. There are now around 900 existing joint and articulation programs approved by the Chinese Ministry of Education (MoE) for bachelor degree courses and other postgraduate courses. The bulk of these existing programs are focused on business-related courses, such as management and economics, as well as engineering. Nevertheless, there are a number of joint programs that have never actually opened to recruit students, despite gaining approval from the MoE. These inactive joint programs usually arise from one or both partners failing to meet the other's objectives.

Overview of Joint And Articulation Programs in China

Regulation for joint programs in China (the Sino-Foreign Cooperation in Running Schools Regulation) was first implemented by the MoE more than a decade ago in 2003. The policy stipulated that only university agreements categorized as joint programs required approval by the MoE (as opposed to other partnerships, such as articulation programs and university exchanges) and that these programs required a minimum of one-third contribution to the course's teaching and curriculum by the overseas partner university.

The MoE placed a freeze on joint program approvals in 2006 in an effort to slow the growth of joint programs and uphold quality standards. Following this, the number of articulation programs increased noticeably, as this was the only viable channel to establish combined Chinese and overseas university programs. These programs had been operating in a somewhat grey and loosely regulated area; in particular, under these agreements, the overseas partner university was under no obligation to make any

contribution to the China-based course (either teaching or curriculum) and, as a result, MoE approval was not required up until 2007 (see Table 1 for more details on joint and articulation programs).

In an effort to control the quality of articulation programs, the MoE broadened the scope of their approval authority in 2007 to include articulation programs, publishing a new regulation called the Circular No. 14, which covers all programs that include international articulations and overseas degree accreditation.

The introduction of Circular No. 14 and the removal of the freeze on joint program approvals in 2008 have seen a reversal in popularity back to joint programs, with applications for articulation programs slowing in recent years now that they also require MoE approval.

More recently, the MoE established a new office to evaluate the quality of existing joint programs in 2013. Looking forward, regulation of joint and articulation programs is expected to become increasingly decentralised in coming years, with approval rights shifting from the MoE to provincial education bureaus. Consistent with this, last year Zhejiang province became the first Chinese province to gain independent authority to approve joint programs at a provincial level.

Joint Program Approval Procedures and Estimated Timeframe

Since 2011, the MoE approval rate for joint programs has stabilised at 28-48 per cent. In addition, the approval process is both lengthy and challenging. Joint program applications can only be submitted by the Chinese partner university, and need to be approved at both a municipal and provincial level. Only around 10-20 per cent of applications are processed within the indicated timeframe.

Table 1: Overview of Joint and Articulation Programs

	JOINT PROGRAMS	ARTICULATION PROGRAMS
Nature of Enrolment	Students are often enrolled at the foreign university to begin with; some enrolled at both universities.	Students enrolled at Chinese university when they begin the course and typically shift to foreign university at some point in degree.
Outcome for Graduates	Students can complete the course without going abroad, earning a degree from the foreign university (can sometime also earn an additional degree from the Chinese university).	Only a subset of enrolled students will meet entry requirements to articulate to the foreign university to gain foreign degree. Others will complete the course in China, with only quota students obtaining a Chinese degree.
Foreign Teaching Requirement	MoE requires that the foreign university provide a minimum of one-third of the curriculum or teaching resources. Foreign teaching input is often highly visible and significant.	Not clearly required but desired by the MoE. The foreign teaching component in the China-based component of course is often absent or limited, with the exception of language courses.
MoE Approval	Required (since 2003)	Required (since 2007)

Table 2: Successful Sino-Foreign Joint Programs

	VICTORIA UNIVERSITY (AUSTRALIA)	UNIVERSITY OF TECHNOLOGY SYDNEY (AUSTRALIA)	NOTTINGHAM UNIVERSITY (UK)
Chinese Partner University	Liaoning University	Shanghai University	N/A
Type of Partnership	Joint Institute	Joint Institute	Independent University
First Year of Student Intake	2000	1994	2004
Cohort in China	1,200	3,000	5,600 (around 1/3 undergraduate students)
Number of Students Attending Program at Overseas University Campus Each Year	250 - 300	Over 450	Over 300

Joint and articulation programs usually take between one and two years to gain approval, which includes around one year for the Chinese and overseas universities to reach an agreement, followed by between six months and one year for the application to be approved by the MoE.

Some universities have started to recruit students prior to receiving formal approval, with students and their families seemingly willing to take on the risk that the program may not be approved. Often these students are offered discounts on tuition, as well as early offers of admission (usually before the prospective student has graduated from high school).

Many overseas and Chinese universities are becoming increasingly concerned with the time and effort involved in establishing a joint or articulation program. Education consultants and China-based education agents are also losing interest in these projects. According to Mr Zhang, a Shandong-based agent and an expert in "B2B" business (university to university), "Joint programs take too long to implement. We are no longer interested in working with universities to establish joint programs on a commission basis as the leadtime is too long. We now charge foreign universities a fixed fee for these projects and are placing more emphasis on university collaborations that do not require MoE approval".

Those universities that are interested in internationalisation but are unwilling to commit to a joint or articulation program have a range of alternatives that do not require MoE approval, including university exchanges, foundation courses, foreign language courses and importing foreign curriculum.

Is a Joint Program Worth the Effort?

Historically, there have been some very successful joint programs in China (see Table 2 for more details). However, not all Sino-foreign joint programs have been successful. In 2012, the undergraduate joint program between Peking University and Yale University in Beijing collapsed after running for less than a decade, owing to high expenses

and low enrolment. Tianjin University entered into a lengthy negotiating process with an Australian university to recruit students for a master's in clinical care; however, the program never got off the ground. After operating for more than a decade, Rutgers' EMBA program finally closed its doors (and merged in with China Central Finance University).

The market has become increasingly competitive as more and more overseas universities enter the China market to set up collaborations. Simply establishing a joint program as a mechanism to channel Chinese students back to the overseas university is no longer very effective. Moreover, Chinese universities are now fully aware of foreign universities' appetites for joint programs and have become increasingly selective about which universities they choose to partner with, as well as extending the negotiation time to remain attractive and competitive to other – and potentially better – offers.

Joint and articulation programs have also developed a mixed reputation among prospective Chinese students and employers. This reputation has been dragged down by a number of lower quality programs approved during the past 10 years. In 2012, five out of the existing six joint programs in Henan province struggled to meet their recruitment quotas.

A number of universities in Shandong province are facing the same problem; for example, enrolment for the joint program between the FOM University of Applied Sciences for Economy and Management (based in Essen, Germany) and Shandong Agricultural University was 20 per cent below the approved quota in 2013.

The benefits of gaining MoE approval for joint Sino-foreign university partnerships have become less clear in recent years. If the Zhejiang pilot project proves to be successful, this policy is likely to be rolled out to other provinces in China and may weaken the MoE's ability to control the quality of joint programs. In any case, it is likely that the market will play a larger role in determining a program's success or failure in coming years.

AUSTRALIAN UNIVERSITIES AMONG FIRST TO RECOGNIZE GAOKAO SCORES

Australian universities are among the first international higher education institutions to recognize Chinese University Entrance Examination (Gaokao) scores for Chinese applicants. With the exception of the University of Melbourne, all the other 7 members of the Group of Eight (Go8) accept Gaokao scores.

More broadly, close to half of the 42 Australian universities approved by the MoE recognize Gaokao scores. In a similar vein, close to 30 Canadian universities now recognize Gaokao scores, including the University of Toronto, the University of British Columbia and McGill University. Several universities in France and Germany also accept these scores. There are currently no universities in the UK, the US or New Zealand that issue offers of enrolment based on Gaokao scores.

DEMAND EASING FOR TRADITIONAL STUDENT RECRUITMENT AGENCIES

Across China, demand for traditional student recruitment agencies is slowing, with only around 40 per cent of prospective students applying to overseas universities through recruitment agencies in 2012 (down from 60 per cent in 2011). This trend reflects an increasing number of students applying directly to foreign universities (up 10 per cent in 2012, to 35 per cent); in part, owing to improved access to digital channels that enable easier university research by the student.

Improved access to a broader range of channels through which prospective Chinese students can apply to an overseas university has also contributed to the shift away from traditional recruitment agencies. These new channels include online education consulting platforms, individual recruitment agencies run by experienced education consultants and a growing number of overseas university representative offices in China.

POLICY

MOE FLAGS REFORMS TO JOINT PROGRAM APPROVALS AND RENEWALS

The Chinese Ministry of Education (MoE) recently announced that they are ceasing approvals for new joint programs focused in highly concentrated disciplines. These include management and business joint programs, which account for around one-third of all existing programs in China. The MoE also noted that applications for joint programs partnering with universities in less concentrated central or western regions in China will be treated favorably in future approval rounds.

Prior to the announcement, 68 new joint programs were

approved in the September approval round and included among these were several general management, finance and accounting programs (see **Useful Data** for detailed information on newly-approved programs).

The MoE is also in the process of reviewing existing joint programs and, after reviewing over 300 programs between January and November this year, has indicated that they will begin issuing a number of programs flagged as underperforming with a warning to increase the quality of the program. There are also signs that the MoE will introduce stricter quality-related policies for joint program approvals, as well as a procedure to terminate underperforming programs in the near future.

CHINA JOINS WASHINGTON ACCORD

In June 2013, China successfully achieved provisional member status of the 'Washington Accord', becoming the twenty-first member of the international engineering alliance. The Washington Accord was established in 1989 by professional civil engineering groups from the US, the UK, Canada, Ireland, Australia and New Zealand and is an international agreement among bodies responsible for accrediting engineering degree programs. China's entry into the accord is seen as an effort to improve recognition and mobility of the country's engineering graduates and professionals at an international level. Entry into the accord is also expected to enhance the quality of training and expertise in the field, as well as facilitate more engineering-related partnerships between universities in Washington Accord member countries and China.

JOINT PROGRAMS/R&D

DUKE UNIVERSITY RECEIVES FINAL APPROVAL FOR KUNSHAN CAMPUS

Duke University received final approval from the MoE for its planned campus in Kunshan near Shanghai, which will be a joint venture between Duke and Wuhan University. The campus has overcome several stumbling blocks in its establishment, with Duke's original partner – Shanghai Jiaotong University – pulling out of the agreement, as well as construction delays. The campus will start recruiting students and faculty for enrolment in late 2014 and will initially offer master's degree programs in global health and management studies.

DICKSON STATE UNIVERSITY REMOVED FROM THE MOE LIST

After Dickson State University in North Dakota was reported to have issued bogus degrees last year, many of the university's joint programs were forced to cease recruiting for 2013. The university previously had arrangements with 19 Chinese universities, including Central National University, Capital Economic & Trade University, Sichuan Foreign Language University, Suzhou University and Dalian Foreign Language University.

During the investigation, Dickson State University remained on the MoE's list of recognized overseas degrees, creating controversy among several of DSU's Chinese university partners. The university has since been removed from the list (an action that is viewed very negatively in China and can have a damaging impact on future student recruitment). 27 universities from North Dakota remain on the MoE's list.

AUSTRALIA-CHINA JOINT WATER RESEARCH CENTER LAUNCHED IN BEIJING

According to the Asian Scientist, water efficiency, food security and environmental sustainability will be the focus of a new joint research center between Australia and China, launched officially in Beijing in June.

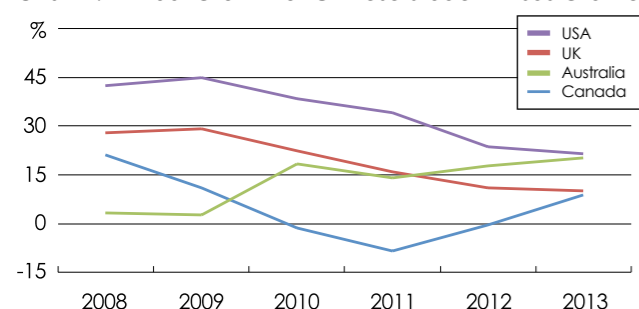
The Australia-China Joint Research Center for River Basin Management will provide both countries with a platform to address national priorities for water resources management. The University of Melbourne is the lead Australian partner and, in China, the center will be supported by ten partners including the Chinese Academy of Sciences, the Ministry for Water Resources and Tsinghua University.

The center is one of six recently announced joint research centers co-funded by the Australian and Chinese governments as part of the Australia- China Science and Research Fund (ACSRF).

STUDY ABROAD/VISA UPDATES

MORE CHINESE STUDENTS CHOOSING TO STUDY IN THE UK

Chart 1: Annual Growth of Chinese Student Visas Granted



Note: Figures from 2013 are estimates.

Sources:

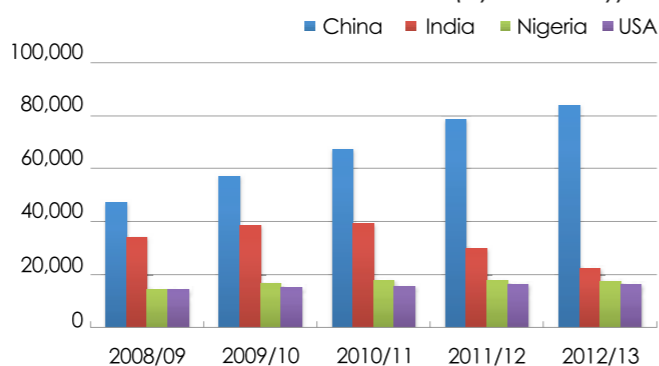
Australian Department of Immigration and Citizenship; Citizenship and Immigration Canada; UK Home Office; US State Department

An increasing number of Chinese students are choosing to study in the UK, with almost 70,000 Chinese studying at a tertiary level in 2012-13. According to recent data released by the UK Home Office, over 60,000 student visas were issued to Chinese students in 2013, including more than 10,000 short-term study visas, representing an annual increase of 10 per cent. In contrast, student visas issued to Indian students (the second largest foreign student

nationality in the UK) continued to decline, while estimates suggest that visas issued to American students were broadly unchanged in 2013.

Nevertheless, annual growth in student visas granted to Chinese students moving to the UK has eased noticeably in recent years from around 30 per cent in 2009. Factors contributing to this slowing growth include the cancellation of post-study visas in the UK in 2012, as well as an increasing number of Chinese students choosing to study elsewhere, such as Canada and Australia.

Chart 2: International Students in the UK (by Nationality)



Source:

Higher Education Statistics Agency Ltd

UPDATE ON STUDENT AND POST-STUDY VISA POLICIES AROUND THE WORLD

Australia introduced a new post-study work visa policy in March last year. The policy enables international graduates who hold an Australian bachelor's, master's or doctoral degree to seek employment in Australia without any limitations related to their chosen discipline and before they qualify for permanent residency. Bachelor's and master's (by coursework) degree graduates can work in Australia for up to two years following graduation, while master's (by research) and doctorate graduates can work in the country for three and four years, respectively. More recently, there have been indications by the current government that post-study work visas will be extended beyond universities to vocational college graduates.

New Zealand's Immigration New Zealand (INZ) and Education New Zealand (ENZ) announced that, from the beginning of 2014, full-time students in the country are able to work part-time during the semester and full-time during semester breaks, including students on language-training visas and those in their last two years of high school. Students studying at a master's (by research) or PhD level have no work rights restrictions.

Canada introduced an intake cap of 12,000 applications under the Canadian Experience Class (CEC) immigration category, effective 9th November 2013. In addition to the cap, the new CEC rule now disqualifies applicants with work experience in fields that are traditionally popular among Chinese graduates, including cooks, administrative officers

and assistants and accounting technicians. Canada also recently announced a new C\$20 million internationalization policy with the aim of doubling the number of international students to more than 450,000 by 2022, focusing on 6 specific countries including China.

Sweden's senior political, academic and business figures have requested a relaxation to the country's strict post-study visa, which requires students and researchers at Swedish universities to leave the country just 10 days after completion of their studies.

The UK is looking into new ways to meet international students' high demand for work experience, following the cancellation of the post-study work visa in 2012. Both UK Trade and Investment (UKTI) and the Overseas Student Service Centre Ltd (OSSC) are developing programs to place students in internships at local businesses, reflecting the fact that employment experience is a key deciding factor for Chinese students when choosing an overseas university.

MARKET & MEDIA MONITOR

Table 3: News and Video Exposure of Australia's 'Group of Eight' Universities on Baidu (number of results, December 2014)

UNIVERSITY	NEWS	VIDEO
University of Sydney	321,000	1176
University of Queensland	129,000	552
University of Melbourne	194,000	515
University of New South Wales	107,000	406
Australian National University	110,000	176
Monash University	84,700	130
University of Western Australia	80,300	57
University of Adelaide	86,400	57

Notes:

- The vast bulk of online information relating to overseas universities is either a direct translation from the overseas university's homepage or a translation by Chinese student recruitment agencies. Very few Chinese-language foreign university websites are specifically tailored to the Chinese market or translated from non-recruitment sources.
- Research has shown that most Chinese people, including those with advanced English language skills, tend to conduct their study abroad research in Chinese rather than English.
- Baidu, the biggest search engine in the Chinese language, now has a market share of 70 per cent.

Table 4: News and Video Exposure of the Top 20 Universities Worldwide on Baidu (number of results, December 2014, in Chinese)

UNIVERSITY	COUNTRY	NEWS	VIDEO
Yale University	USA	1,170,000	32,791
Stanford University	USA	1,420,000	14,929
Harvard University	USA	2,850,000	14,913
Massachusetts Institute of Technology	USA	1,340,000	5,934
University of Oxford	UK	1,060,000	5,656
University of Cambridge	UK	1,390,000	5,099
Columbia University	USA	404,000	3,600
Princeton University	USA	280,000	3,136
University College London	UK	225,000	1,979
University of Michigan	USA	224,000	1,439
University of California, Berkeley	USA	556,000	1,114
University of Toronto	Canada	216,000	1,132
University of California, Los Angeles	USA	340,000	1,066
University of Pennsylvania	USA	176,000	884
University of Chicago	USA	225,000	796
Cornell University	USA	227,000	791
California Institute of Technology	USA	211,000	359

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USEFUL DATA

NEW MOE-APPROVED SINO-FOREIGN JOINT PROGRAMS (DECEMBER 2014)

Table 5: New Joint Programs
(By Study Level and Student Intake)

PROGRAM STUDY LEVEL	QUOTA	NON-QUOTA
Undergraduate	59	0
Postgraduate	3	6
Total	62	6

Chart 3: New Joint Programs
(By Location of Chinese Partner University)

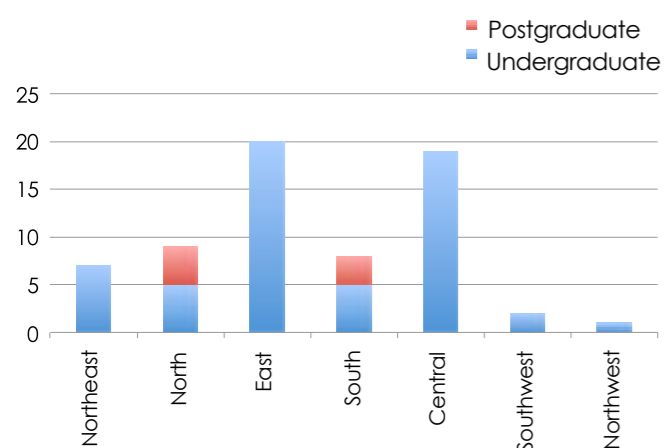


Chart 4: New Joint Programs
(By Discipline)

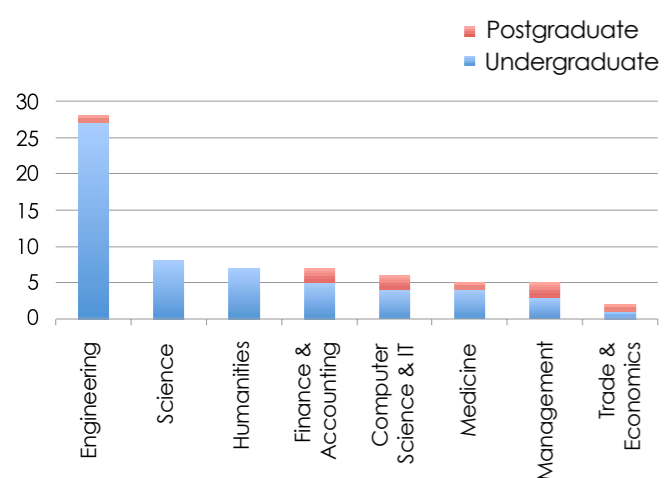


Table 6: New Joint Programs
(By Location of Partner University)

LOCATION OF PARTNER UNIVERSITY	NO. OF JOINT PROGRAMS APPROVED	SHARE OF TOTAL (%)
US	16	23.5
UK	13	19.1
Australia	9	13.2
Ireland	6	8.8
Russia	6	8.8
Korea	4	5.9
Germany	3	4.4
Canada	3	4.4
India	1	1.5
France	1	1.5
Finland	1	1.5
Italy	1	1.5
Singapore	1	1.5
New Zealand	1	1.5
Hong Kong	1	1.5

Note:

Only one PhD-level joint program (in Medicine and only for quota students) was approved in the December 2014 approval round. This is included under postgraduate level study in all of the above tables and charts.

INDUSTRY JOURNAL ARCHIVE

- Issue 12** **Building the Most Suitable Curriculum for Your Joint Program**
We provide an overview of MoE curriculum and teaching requirements for joint programs and institutes, and explores three existing curriculum design models in China.
- Issue 11** **Making Best Use of Alumni Networks in China**
We present an update on the state of alumni engagement in China, information on how to reach out to alumni and how best to engage with them. We also explore the objectives of building an alumni network in China through in-market observations.
- Issue 10** **Building Better Partnerships in China**
We scrutinize key factors and principles that contribute to successful partnerships, including government approval, partner selection, and what to include in partnership agreements.
International Fake Degrees
We provide information on the current state of degree forgery around the world, as well as methods universities are using to curb the use of fake degrees.
- Issue 9** **Different Ways to Build a Physical Presence in China**
We describe the three main models institutions are using to establish local presences, the methods being used to establish each model, and their strengths and weaknesses.
- Issue 8** **Shaping Your Social Media Strategy in China**
We summarise key characteristics of popular social media platforms in China and discuss how foreign education providers can most effectively use social media to improve brand awareness and attract Chinese students.
- Issue 7** **Paving the Way to Studying Abroad – Pathway Programs in China**
We examine the history of pathway programs in the China market and the challenges currently faced by program providers and their partner institutions. We also look at the key drivers for the continued development of both pathway program recruitment and course delivery in China, and consider how these activities impact overseas universities' strategy and reputation in China.
- Issue 6** **The Growth of MOOCs in China**
We investigate the current state of the Chinese MOOC market, as well as the benefits and challenges of building a MOOC presence in China.
- Issue 5** **To Branch Campus or Not To Branch Campus?**
We explore the risks and rewards of establishing a campus, and provide important considerations for institutions thinking about opening a branch campus in China.
- Issue 4** **Sino-Foreign R&D Collaborations in China**
We provide an overview of R&D in China over the past decade, examining developments in R&D by sector, by activity and by leading fields of research, as well as recent trends in Sino-foreign co-authored publications.
- Issue 3** **Do the Benefits of MoE-Approved Joint Programs Outweigh the Drawbacks?**
We assess the benefits and drawbacks of establishing a joint program with MOE approval in China and outline changes to joint program regulations over the past decade, as well as detailing procedures and estimated time-frames to acquire MOE approval.
- Issue 2** **How Effective is Your Media Strategy in China?**
We examine the media landscape in China, including digital and more traditional channels. We also look at common misconceptions when marketing an overseas university in China and provide tips about how to improve an institution's visibility in the Chinese media.
- Issue 1** **Working with Student Recruitment Agencies in China – A Parallel Approach**
We analyse the student recruitment agency market in China, including how recruitment agencies operate, market leaders and their focus areas in China, how universities around the world are working with these agencies, as well as providing guidelines on how to optimize university-agency relationships.

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