



O desafio de colocar **10 milhões** de estudantes no ensino superior.

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Hotel Pestana Bahia - Salvador - BA

# Ensino Privado na China

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China

India

Southeast Asia

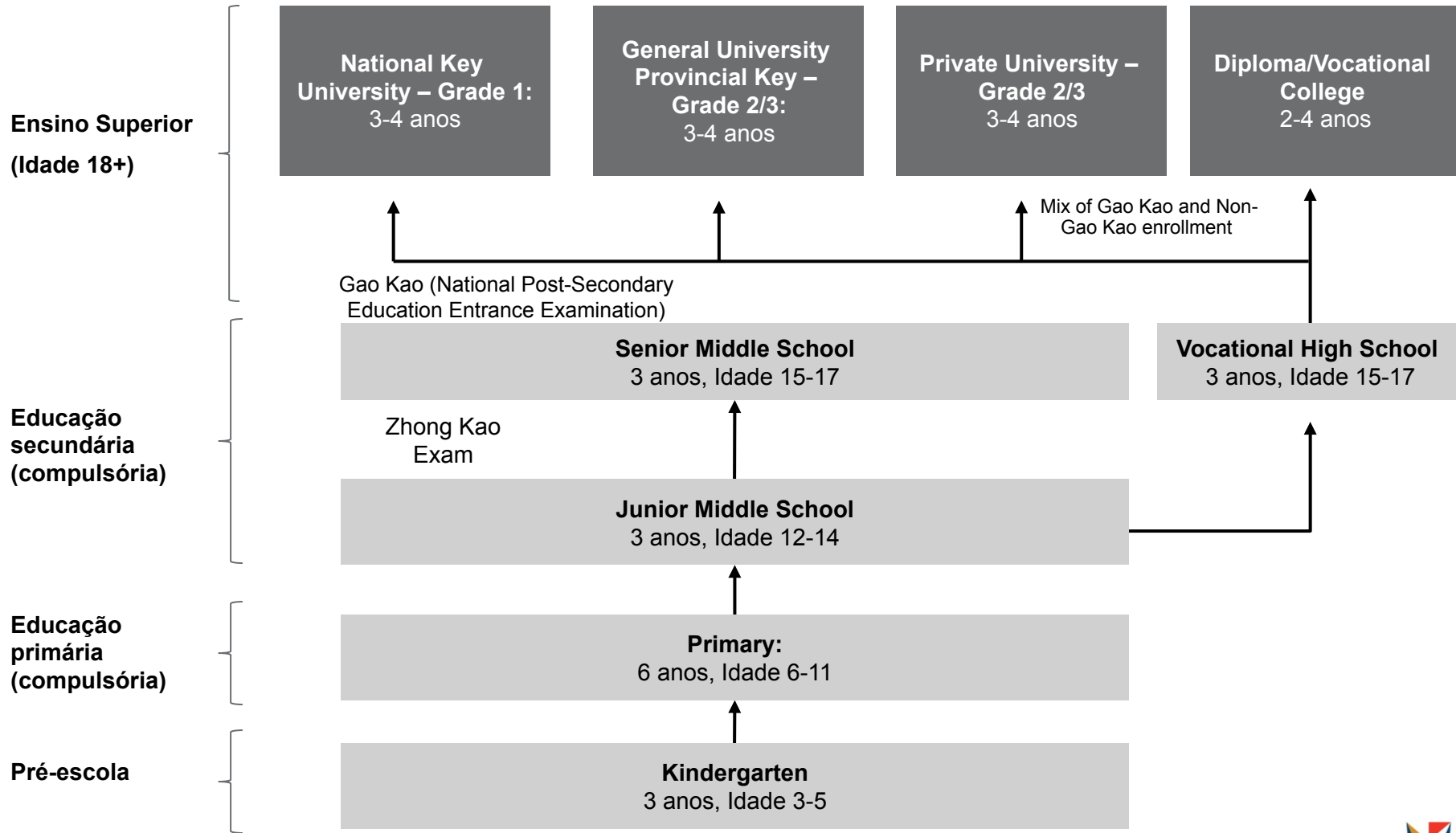
# Educação privada na China - evolução histórica

Período antigo	Até 1840	<ul style="list-style-type: none"><li>• Influência do Confucionismo</li><li>• Somente escolas mantidas pelo Governo</li></ul>
Período moderno	1840-1949	<ul style="list-style-type: none"><li>• Início de ocidentalização</li><li>• Primeiras escolas privadas (religiosas)</li><li>• 1926: cerca de 360 mil alunos em escolas privadas</li></ul>
Período contemporâneo	1949-1978	<ul style="list-style-type: none"><li>• Domínio de Mao Tse Tung</li><li>• Todas as escolas privadas foram estatizadas</li></ul>
	Depois de 1978	<ul style="list-style-type: none"><li>• Início do "socialismo de mercado"</li><li>• 1982: nova constituição permitiu "outros setores" na educação</li><li>• 1985, 1993: reformas da educação enfatizaram a diversificação da oferta</li><li>• 1997: primeira legislação específica para escolas não governamentais</li><li>• 2002: Lei da Promoção da Educação Privada – primeira vez que aparece o termo "privada" de forma explícita</li><li>• 2008: Diretiva 2008 do MEC para escolas privadas</li></ul>

Fonte: Yan Fengqiao (Universidade de Pequim)

# China: visão geral do sistema

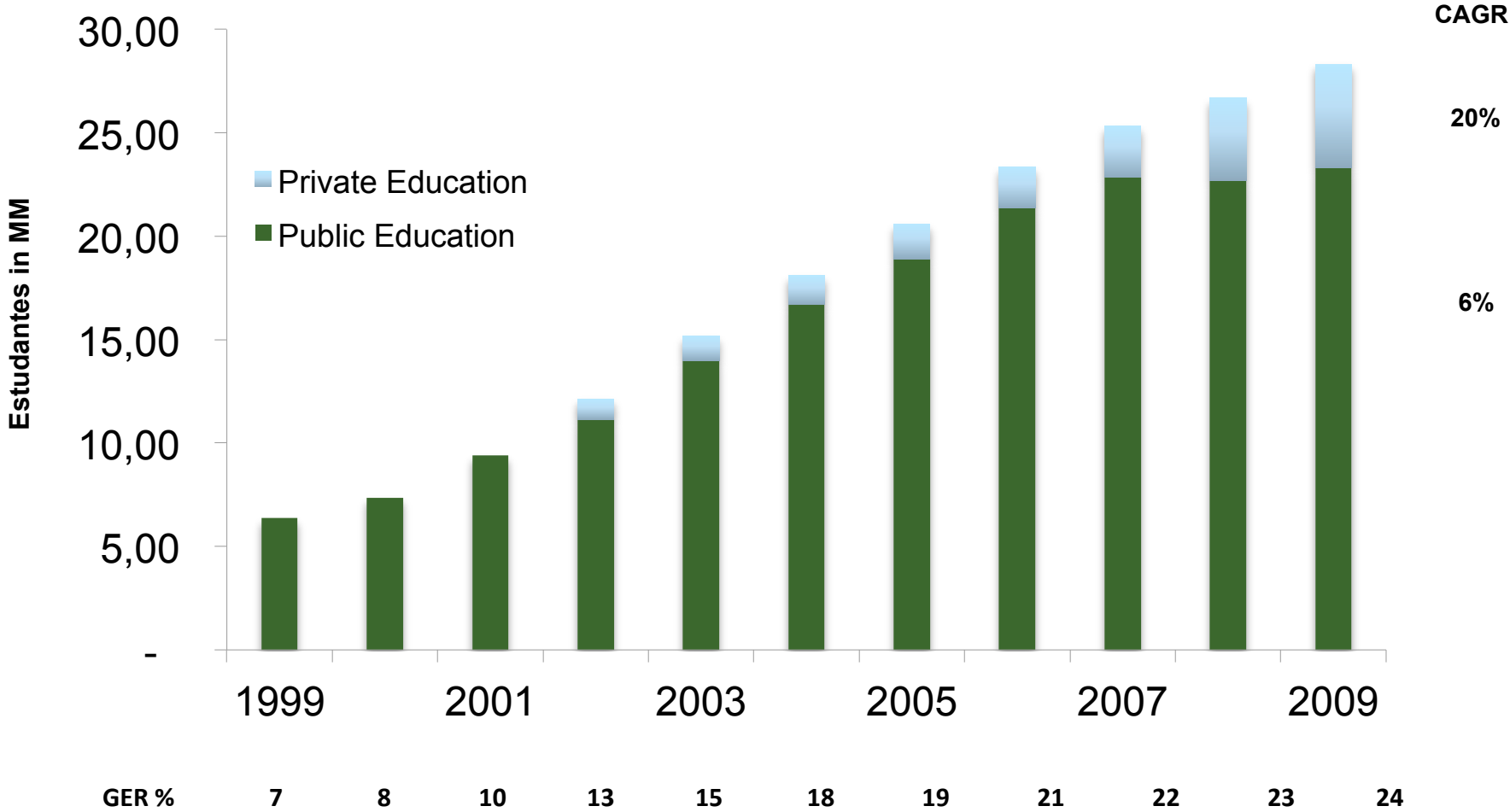
- O sistema atual consiste em seis anos de seis anos da escola primária, seguido de seis anos da escola secundária, e então de 2 a 4 anos de curso superior



Note: Enrollment figures include students enrolled in both private and public schools in China  
 Grades in Universities corresponds to entry requirements in Gao Kao grades, Foreign providers can partner with any valid public/private university or college

# Matrículas do Ensino Superior cresceram a 8% CAGR desde 2005; Setor privado cresceu a 20%

Matrículas totais no Ensino Superior, 1999-2009



Source: China MoE, Parthenon interview with experts. Devry Internal analysis  
 Note: Data only includes student enrollment through the Gao Kao system.

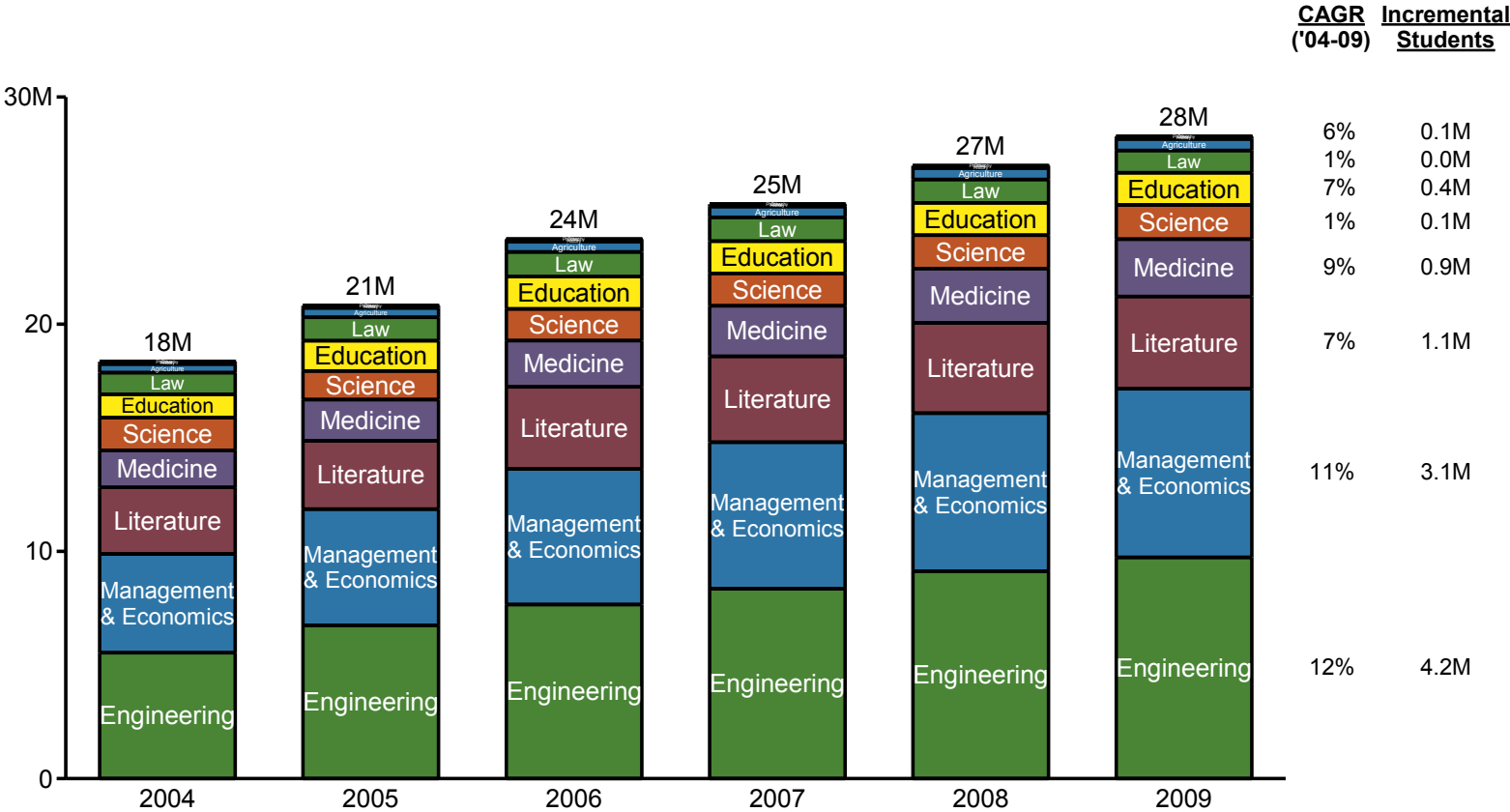
# Evolução da porcentagem de alunos matriculados no ensino privado na China

Nível	1996	2008
Pré-escola	4,9%	39,7%
Ensino Fundamental (1ª. a 5ª.)	0,3%	4,6%
Ensino Fundamental (6ª. a 9ª.)	0,8%	7,6%
Ensino Médio	0,8%	11,6%
Ensino Superior	0,4%	19,9%

Fonte: Yan Fengqiao (Universidade de Pequim)

# Management, Engenharia e Medicina são os cursos com maior crescimento

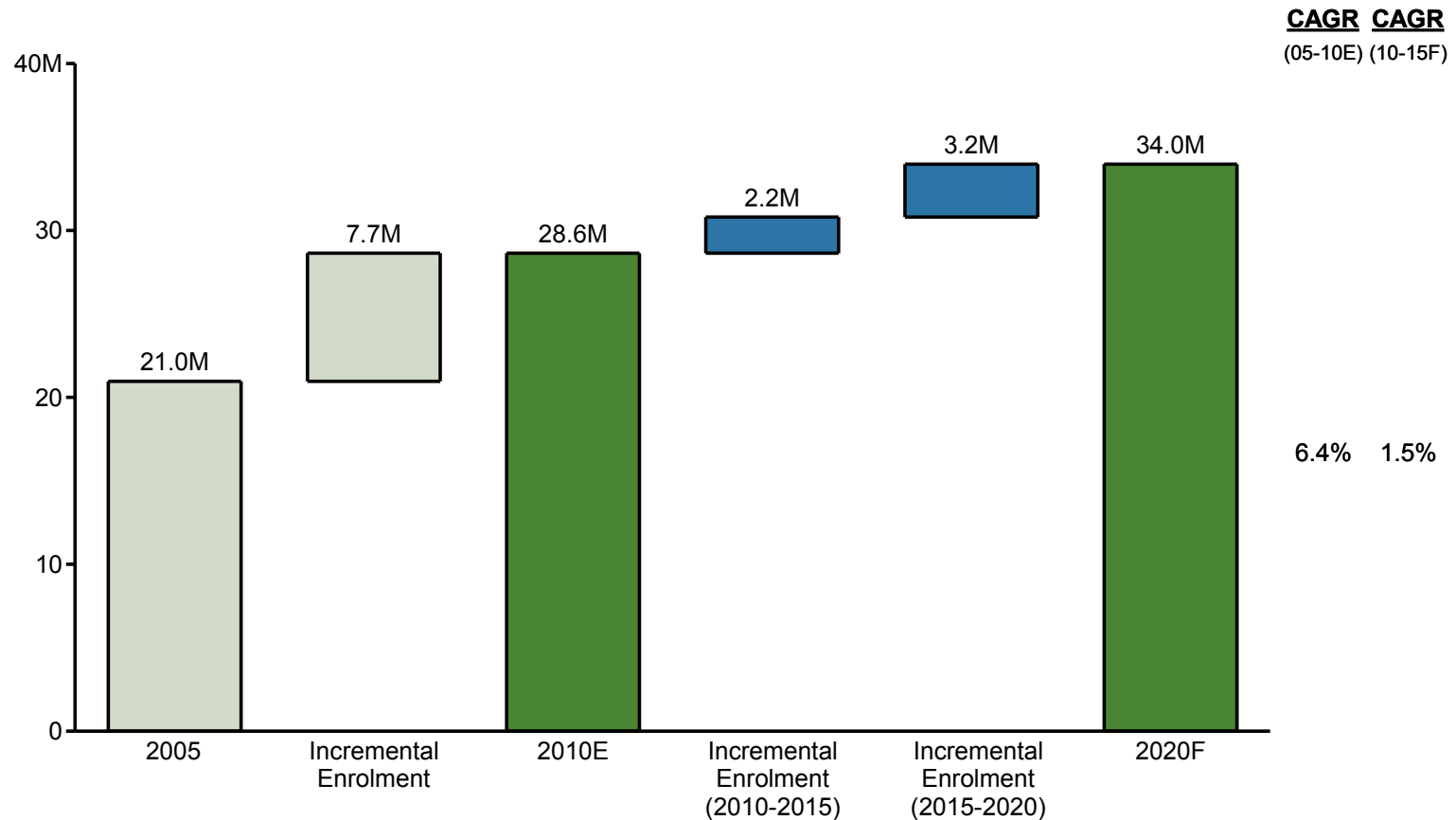
Enrollment by Top Subjects, 2005-2009



Source: China MoE  
 Note: "Literature" Category includes Chinese language and English language, does not include web enrollment

# Crescimento de ~5,5M de vagas em 2020 para suportar o crescimento econômico

Previsão do crescimento das matrículas do Ensino Superior 2004 – 2020F



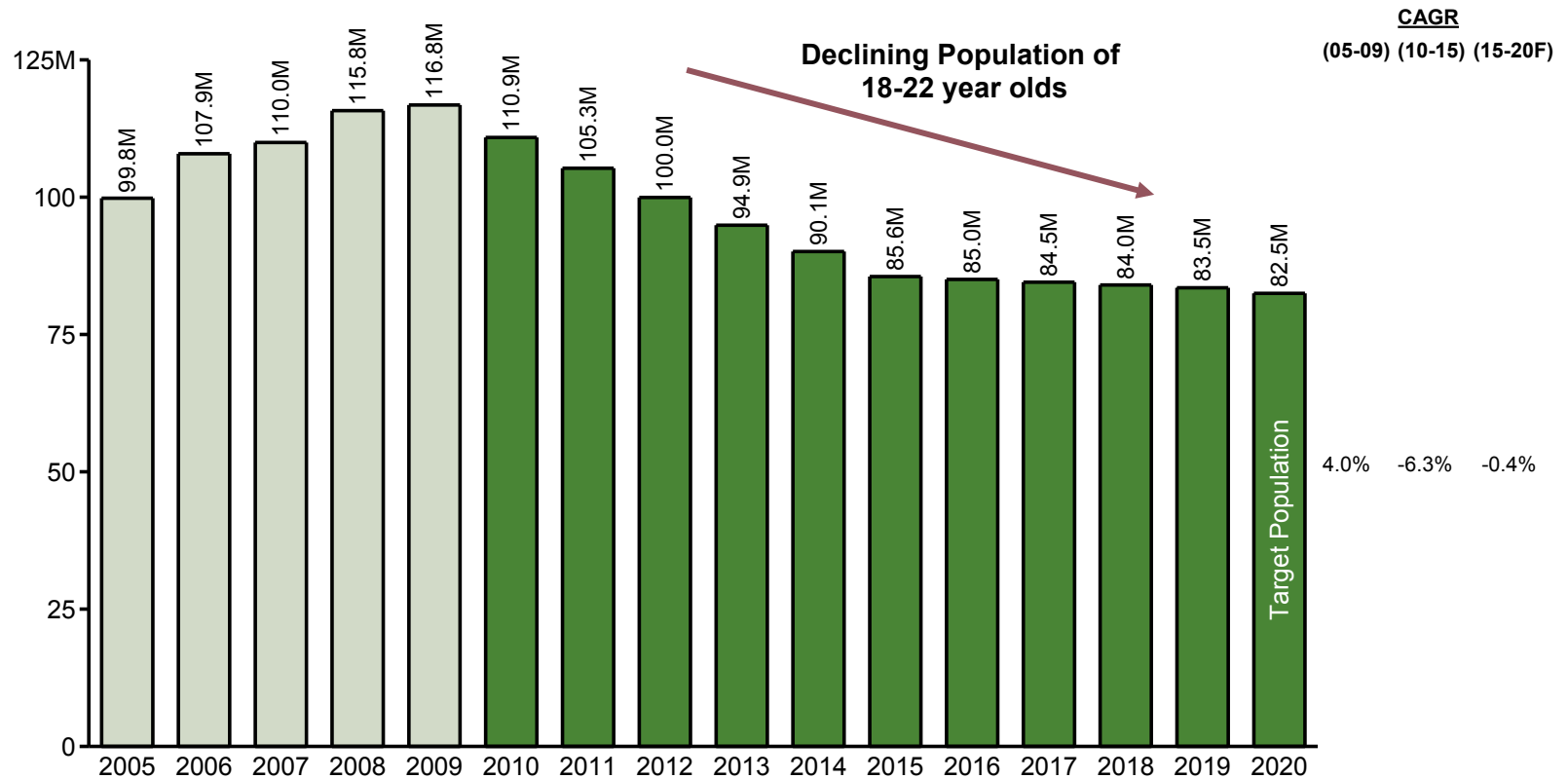
<b>Population 18-22</b>	99.8M	110.9M	85.6M	82.5M
<b>Gross Enrolment Ratio</b>	21.0%	25.8%	36.0%	41.2%

Source: China MoE, Euro Monitor, Parthenon, Interview with experts, Parthenon Model. DV analysis  
 Note: Data only includes student enrollment through the Gao Kao system. Chinese government target is 40% for Enrollment Ratio by 2020.



# Visão geral das tendências demográficas

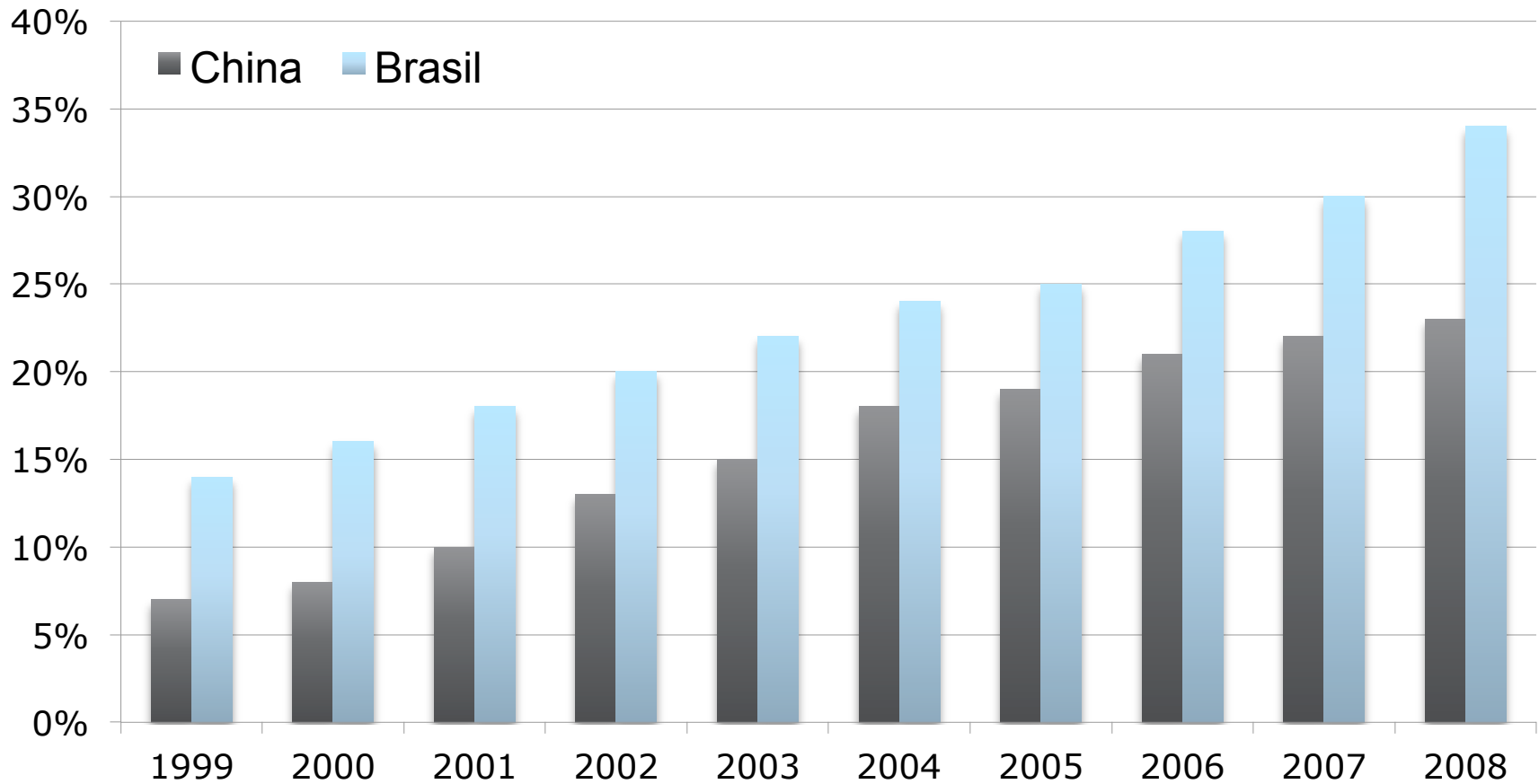
Target Population (Age 18-22 years), China, 2004-2020 \*



Note: \* Target Population assumed to be 18-22 years of age. Exchange rate from 5/1/2011 One Child Policy in China was made into effect in 1982.  
 Source: Euromonitor, Ministry of Education, National Bureau of Statistics

# Taxa de escolaridade superior bruta

Em 1999, a taxa chinesa era 50% da brasileira. Em 2008, passou para 68%



Fonte: UNESCO

# Principais desafios do ensino privado na China\*

- Qualidade: falta de um esquema bem desenvolvido nacional de acreditação e controle da qualidade. Falta de criatividade e ensino prático. Empregabilidade dos formados
- Gargalos: falta de flexibilidade no ensino privado resta mobilidade ao sistema
- Proposta de valor: o setor privado criando soluções específicas
- Consistência nas políticas: as regras não são as mesmas para o ensino público e privado criando distorções
- Acesso: famílias de baixa renda não têm mecanismos de acesso ao ensino secundário de qualidade o que resta possibilidades de entrada nas universidades de elite. Também não tem possibilidades de pagar ensino privado de qualidade
- Disparidade geográfica. Foco nas cidades da costa com alta taxas de crescimento econômico

\* De acordo com Yan Fengqiao (Universidade de Pequim) e análise DeVry

# Lições aprendidas

## Positivas

- Capacidade baseada no crescimento econômico
- Plano estratégico para desenvolver um grupo de elite, C9 group
- Benchmark international. Alta competitividade e elevação dos padrões de qualidade
- Disponibilidade de fundos – orçamentos realistas
- Consistência no longo prazo
- Crescimento do programas de de estudo no exterior e internacionais na China

## Negativas

- Extrema segmentação – disparidade – ausência de flexibilidade
- Falta de articulação entre escolas públicas e privadas
- Baixa qualidade no “meio”
- Falta de processos claros para cotas, crescimento e controle de qualidade
- Setor privado não tem papel próprio – fica em segundo nível. Foca em crescimento futuro mas sem papel claro

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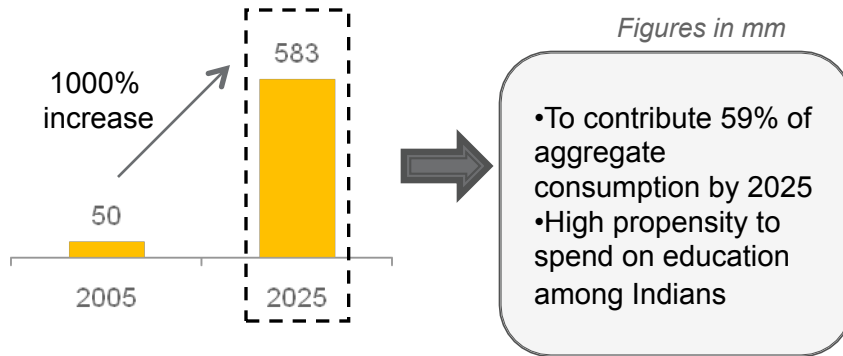
China

India

Southeast Asia

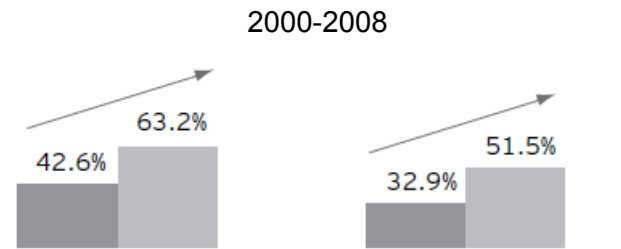
# General overview Indian education sector

## Growth of Middle Class in India

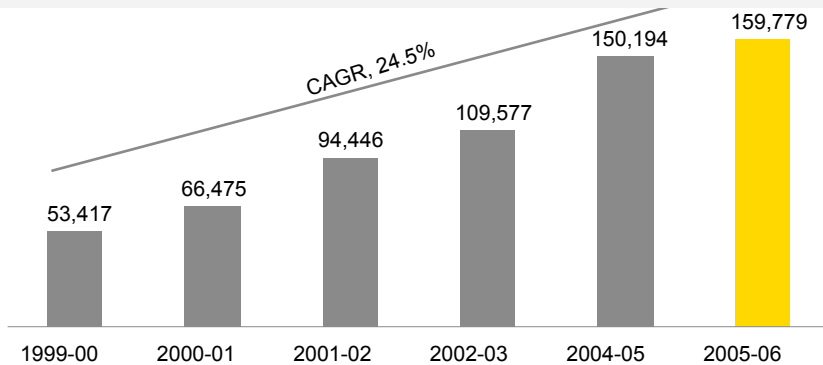


## Private unaided HEIs as a % of total

## Enrollment in private unaided HEIs as a % of total enrollment

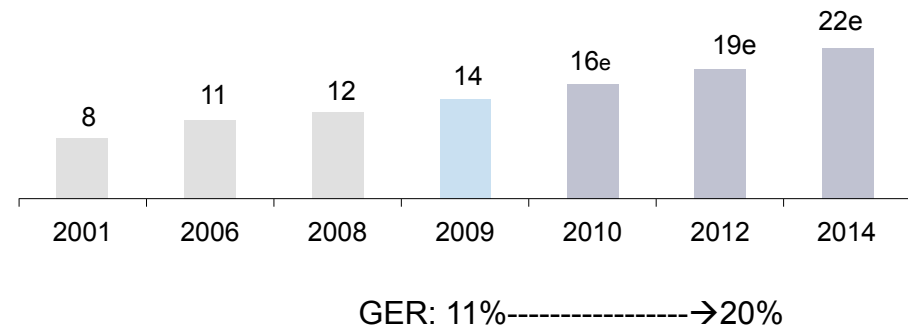


## Growth in Indian students studying overseas



- Out of approx. 160,000 students that study abroad in 2009: 90K went to USA and spent an average of \$45K per year/student

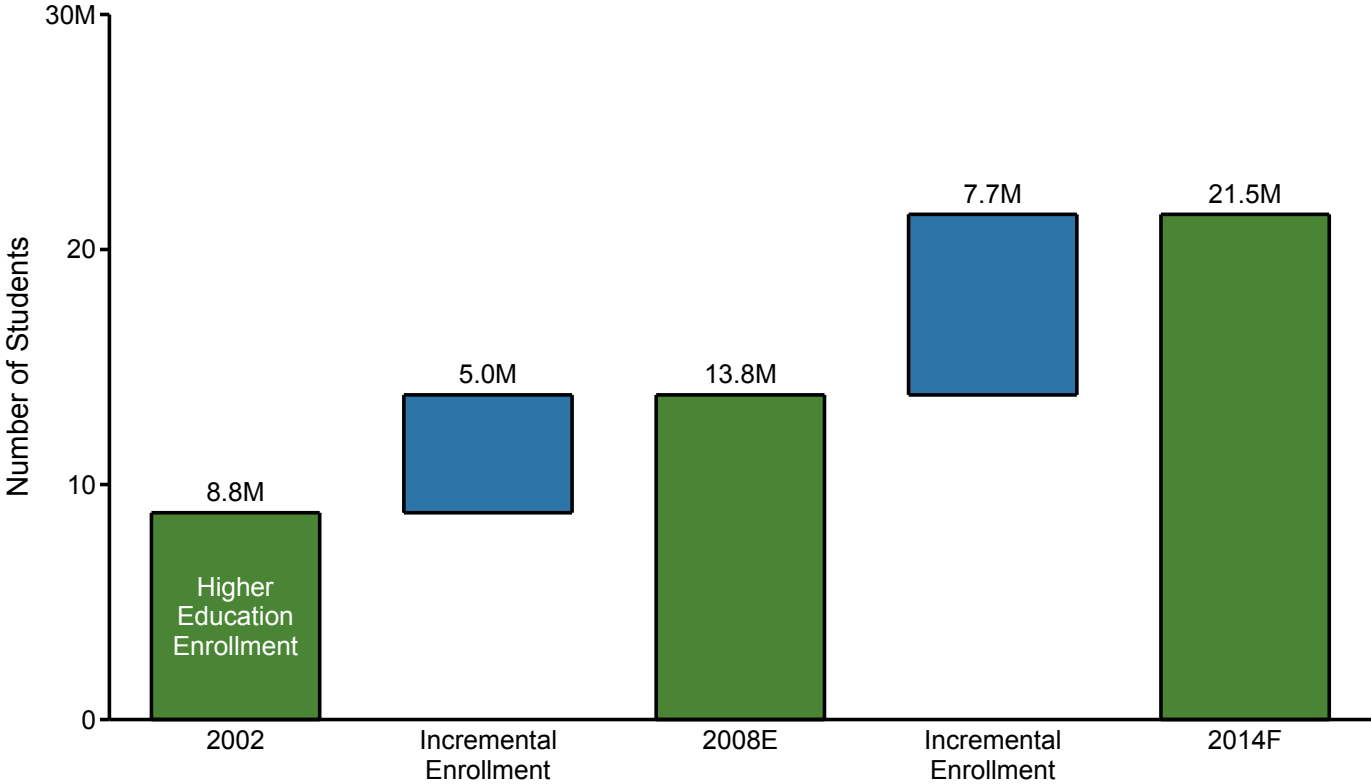
## Rising Enrolment in higher education in India (in million)



# Growth of at 8% CAGR in the last anos. It should add another 7.7M Seats by 2014 to sustain economic growth

Enrollment Forecast for Higher Education, 2002–14

**CAGR CAGR**  
02-08 08-14F



8% 8%

GDP/Capita (US\$ PPP Adjusted)	\$1.7K	\$3.0K	\$4.9K
Gross Enrolment Ratio	10.0%	14.3%	20.0%

# Structure of the Higher Education Market in India

	Institutions of Higher Education				Other Institutions	
	Central/State Owned Universities		Private Universities		Vocational Training Institutes	
	Gov't Universities/ Colleges	Private Colleges	Private Deemed Universities	Private State Act Universities	Gov't	Private
Enrollment Size	• 2K-3K	• 2K-3K	• Up to 6K	• Up to 40K	• 1K-1.5K	• 1K-1.5K
Price Range Per Year (\$)	• 300 – 1,200	• 300 – 1,200	• 2,000–4,000	• 2,000–4,000	• 10-60 (per course)	• 100–600 (per course)
Number of Institutions	• >5,000	• ~12,000	• 130	• 73	• N/A	• N/A
Regulating Authority	• Multiple federal and state bodies, e.g. <b>AICTE, State Education Department</b>		• UGC overview and compliance	• UGC overview only	• No regulations	• No regulations
Key Areas of Regulation	• Oversight on pricing, enrollment and recruitment		• Pricing subject to UGC approval	• Self-regulated	• Self-regulated	• Self-regulated
Option for Foreign Participant	• No	• Yes (Joint program with local partners)	• Yes (Joint program with a local partner)	• Yes (Joint program with a local partner)	• No	• Yes

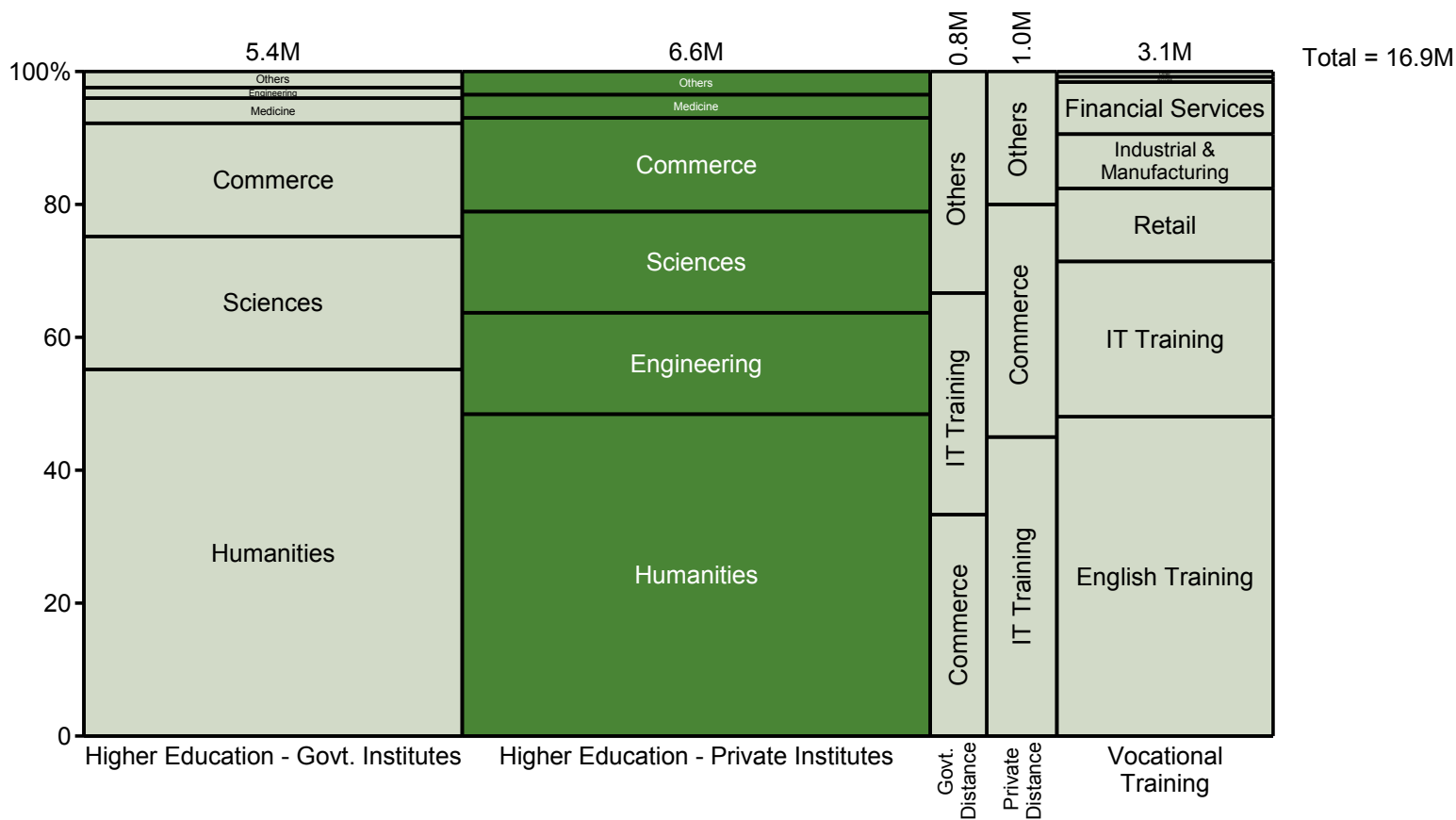


# Indian Higher Education Is a Highly Regulated Market; “For-profit Institutions” are not allowed although they exist

Segment	Regulation	Commentary
<b>Are private universities allowed?</b>	<ul style="list-style-type: none"> <li>• Yes</li> </ul>	<ul style="list-style-type: none"> <li>• Private universities can be either :               <ul style="list-style-type: none"> <li>- Private Deemed (status granted by UGC)</li> <li>- Private State Act (status granted by the State Government)</li> </ul> </li> </ul>
<b>Is accreditation lengthy?</b>	<ul style="list-style-type: none"> <li>• Yes, at least ~1 year</li> </ul>	<ul style="list-style-type: none"> <li>• There is no set time period that it takes to become accredited. Depending on the form of accreditation taken, timelines can vary: 1 year for AICTE, 2-3 anos for Private State Act, &gt;3 anos for Deemed status</li> </ul>
<b>Which are the local government bodies involved?</b>	<ul style="list-style-type: none"> <li>• University Grants Commission</li> <li>• All India Council for Technical Education (AICTE), MCI, etc.</li> <li>• State Governments</li> </ul>	<ul style="list-style-type: none"> <li>• Universities are under the umbrella of UGC</li> <li>• Private technical colleges (engineering and management) are under AICTE</li> <li>• Medical colleges are under MCI (Medical Council of India)</li> <li>• Liberal arts colleges are affiliated to universities</li> </ul>
<b>Can institutions be for-profit?</b>	<ul style="list-style-type: none"> <li>• No, current policies forbid profit making</li> </ul>	<ul style="list-style-type: none"> <li>• Though profits are not allowed in higher education. Profit making exists by setting up trust/management company structure</li> </ul>
<b>Are there limits to tuition fees?</b>	<ul style="list-style-type: none"> <li>• Depends on the type of institution: yes at AICTE colleges; no at deemed and state universities</li> </ul>	<ul style="list-style-type: none"> <li>• States regulate the fee levels at AICTE colleges</li> <li>• Private universities are free to set their own fees</li> </ul>
<b>Is capacity regulated?</b>	<ul style="list-style-type: none"> <li>• Yes, at AICTE colleges</li> <li>• No at deemed and state universities</li> </ul>	<ul style="list-style-type: none"> <li>• AICTE regulates “capacity intakes” by course type and institutions have to apply to increase their capacity</li> <li>• Private universities are free to set their own capacity</li> </ul>

# Private Higher Education Enrollment Accounts for ~40% of the Market and Is Growing the Fastest

Education Market Enrollment in India, 2008



Average Fee	~\$50	~\$850	~\$160	~\$250	~\$370
Total Revenue	\$247M	\$5,597M	\$132M	\$253M	\$1,129M
5 Year Growth Rate	1%	15%	1%	15%	13%

# Lesson learned

## Do

- Development of high quality elite institutions
- Push for studying abroad programs

## Don't's

- No clear rules for accreditation and quality control
- Lack of flexibility in the private sector
- No incentive for innovation
- Lack of of innovative pedagogical approach
- Lower quality in the middle tier

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# Agenda

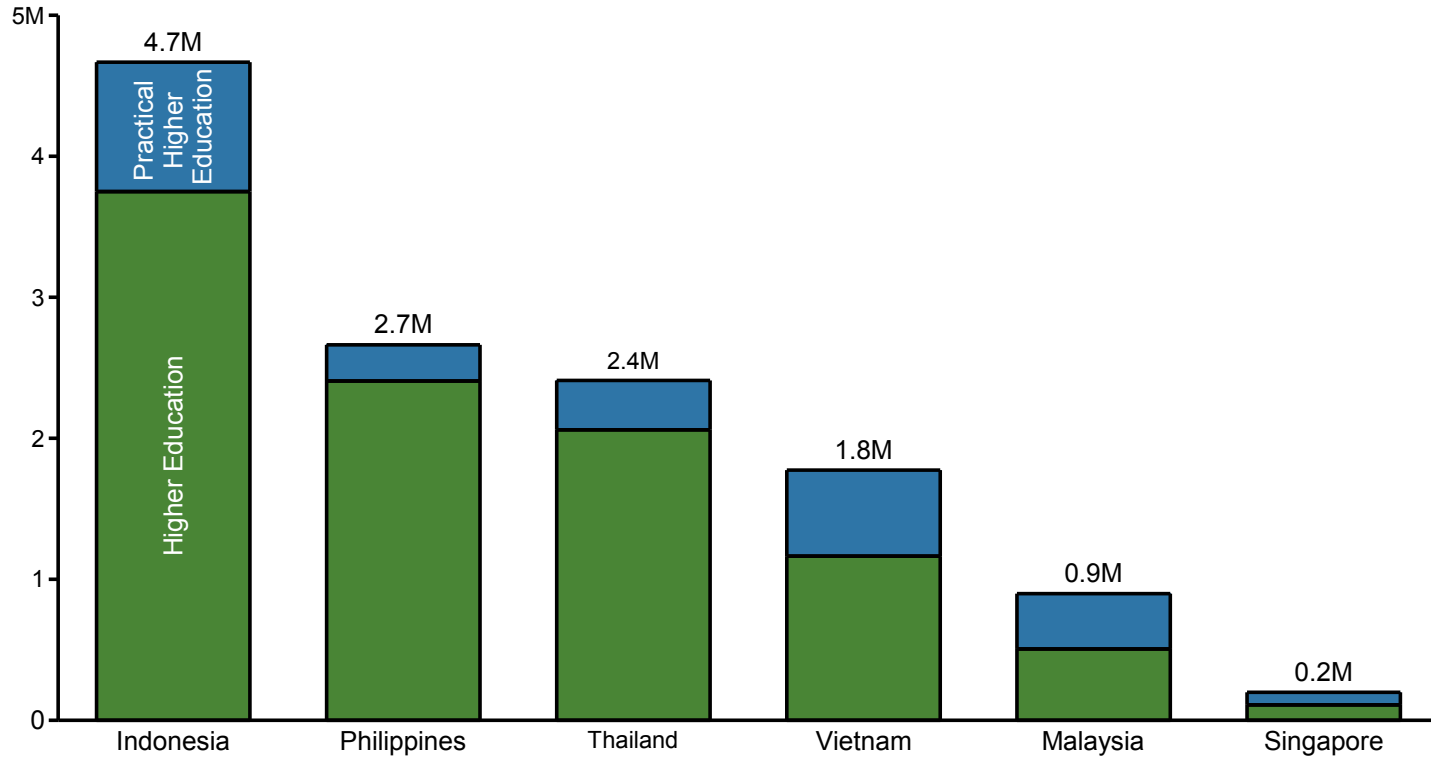
India

China

**Southeast Asia**

# General overview South East Asia

**Total Post-Secondary Enrollment, 2009**

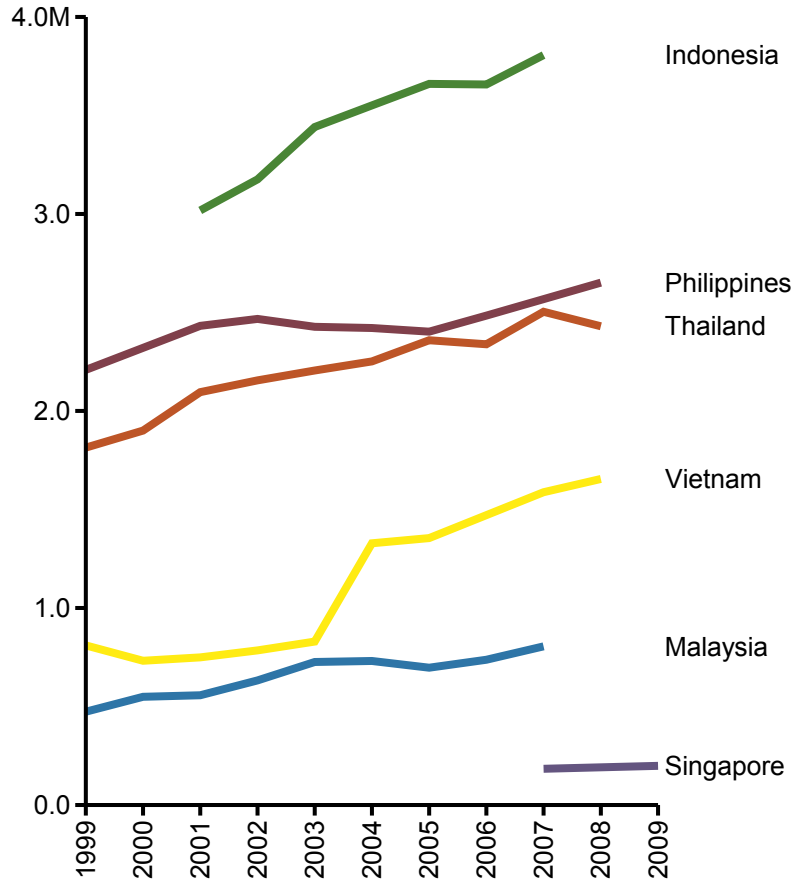


Country	Indonesia	Philippines	Thailand	Vietnam	Malaysia	Singapore
<b>Post-Secondary Enrollment Rate</b>	22%	29%	44%	~10%	30%	34%

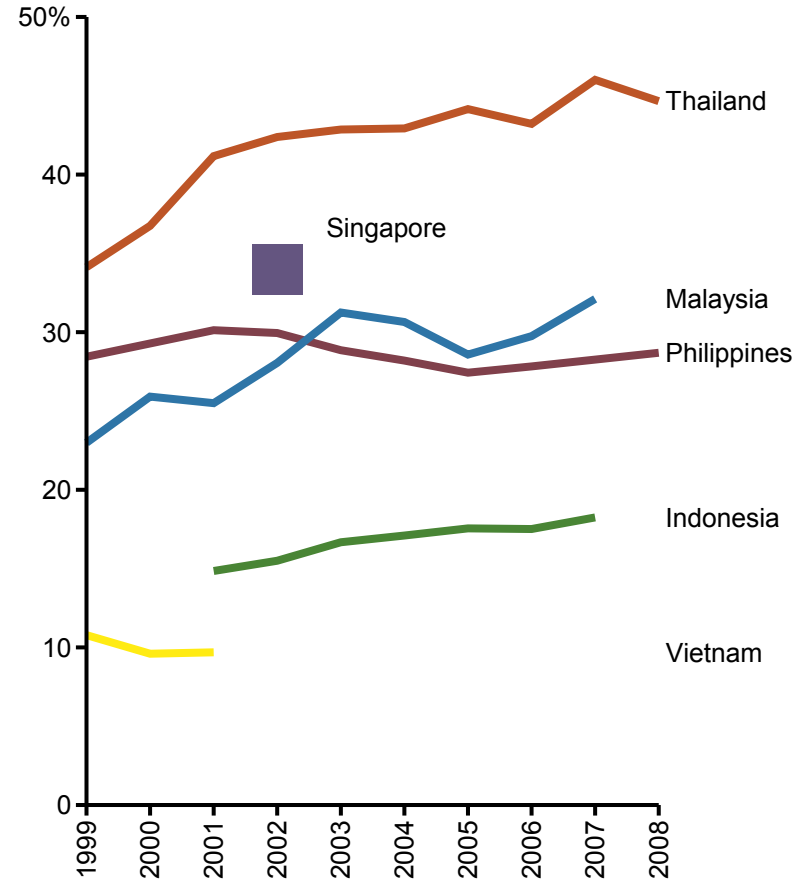
Note: \* Higher Education includes ISCED Level 5A and 6 while Practical Higher Education includes ISCED Level 5B.. Singapore's GER is from 2002  
 Source: UNESCO, World Bank, Primary Research (n=200)

# Post-Secondary Enrollment in Southeast Asia has Experienced Steady Growth Over the Past 10 anos

Total Enrollment, Post-Secondary, 1999-2009



Gross Enrollment Ratio, Post-Secondary, 1999-2009



# Malaysia and Singapore Are Aiming to Attract Foreign Universities and Students

## Attracting Quality Foreign Universities

- *“The Malaysian Government launched the National Higher Education Strategic Plan in August 2007 with the objective of making the country an international center of excellence in education and getting reputed foreign universities to Malaysia is an important part of this plan”*
  - Officer, Ministry of Higher Education
- *“Singapore is actively trying to attract leading international universities to set up campuses here. Currently, MIT, John Hopkins, INSEAD and University of Chicago have already set up campuses in Singapore to attract not only domestic students but also international students from the region”*
  - Economic Development Board

## Attracting International Students

- *“Singapore and Malaysia are aggressively attracting thousands of international students. While Malaysia aims for 80,000 international university students, Singapore hopes to attract 150,000 by 2015, up from 97,000 in 2008”*
  - Professor, Asian Institute of Technology

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**Muito obrigado !**

**Sergio Abramovich**

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