A Technical Research Report on The Development of Hong Kong as A Regional Education Hub

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LIST OF ACRONYMS

AEI	Australian Education International
AIP	Approval In Principle
CPE	Continuing Professional Education
DEEWR	Department of Education, Employment and Workplace Relations
DEST	Department of Education, Science and Training
EDB	Education Bureau
EMB	Education and Manpower Bureau
EMD	Education Market Development
ESM	Education Strategic Marketing
FGI	Focus Group Interview
GATS	General Agreement on Trade in Services
GATT	General Agreement on Tariffs and Trade
G-to-G	Government to Government
HEI	Higher Education Institute
HKCAAVQ	Hong Kong Council of Academic Accreditation & Vocational Qualifications
HKTDC	Hong Kong Trade Development Council
HUCOM	Heads of Universities Committee
JQRC	Joint Quality Review Committee Limited
LPR	Landed Permanent Resident
MOE	Ministry of Education
MOI	Medium of Instruction
MOU	Memorandum of Understanding
MTI	Ministry of Trade and Industry
NLHPEC	Non-local Higher and Professional Education Courses
NUS	National University of Singapore
OECD	Organization for Economic Co-operation and Development
PGDE	Postgraduate Diploma in Education
PTS	Professionals/ Technical Personnel & Skilled Worker Scheme
QA	Quality Assurance
QAC	Quality Assurance Council
R & D	Research and Development
RELC	Regional Language Centre

RPg   Research Postgraduate

SAO   Student Affairs Office

SD   Sub-Degree

SPSS   Statistical Package for Social Science

SSD   Student Services

STB   Singapore Tourism Board

TPg   Taught postgraduate

Ug   Undergraduate

UGC   University Grant Committee

WTO   World Trade Organization

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EXECUTIVE SUMMARY

A Technical Research Report on
The Development of Hong Kong as a Regional Education Hub

Developing Hong Kong as a regional education hub is an important policy concern. Following the analysis of conditions for developing education hub in early 2007 (Cheng, 2007), a research team of the Hong Kong Institute of Education conducted a comprehensive study of the issues, challenges and possibilities in developing Hong Kong as a regional education hub.

The investigation conducted from April 2007 to January 2008 collected views and data from higher education stakeholders in Hong Kong and some emerging Asian markets through both qualitative and quantitative methodologies. It included 74 in-depth interviews and focus group interviews with representatives of higher education institutions (HEIs), policy bodies and Consulate Generals, as well as non-local students in Hong Kong; 16 document collections from HEIs and policy bodies, as well as questionnaires of 1370 participants in international education exhibitions, and students from Mumbai, New Delhi, Jakarta, and Kuala Lumpur. The research also included an integrated analysis of strategies and practices of exporting higher education services in Australia, the UK and Singapore.

The current situation

There were a total of 7293 non-local students enrolled in UGC-funded programmes of the eight UGC-funded tertiary institutions in 2007/08. The academic programmes of "engineering and technology" and "sciences" enrolled the largest numbers of non-local students (1872, 1717). But at the undergraduate level, the largest numbers of non-local students were in the academic programmes of "Business & Management" (1346).

From the data provided by the UGC-funded and non-UGC funded tertiary institutions as at January 2008, there were around 2811 non-local students enrolled in the non-UGC funded programmes with the Business and Management programmes sharing the largest student number (784, 27.9%).

The findings of the study indicate that the profile of non-local students in HEIs was lopsided, with most coming from Mainland China, and Hong Kong higher education was barely visible in some emerging Asian countries with growing demand for international higher education. In the academic year of 2007-08, over 92.5% of non-local students of University Grants Committee (UGC)-funded programmes in Hong Kong came from the Chinese Mainland, while only 4.8% and around 2.7% came from other places in Asia and the rest of the world respectively. Similarly, most non-local students (83.8%) of self-financed programmes came from Mainland

China while only 8.4% and 7.8% came from other places in Asia and the rest of the world.

The five leading sources of non-local students from Asia other than Mainland China in 2006-07 were Macau, Malaysia, Taiwan, India and Sri Lanka. But a high proportion of survey respondents in Mumbai (91.0%), New Delhi (67.6%), Jakarta (70.3%) and Kuala Lumpur (82.9%) still considered that the promotion activities of HK's higher education were not visible. Comparatively, students in these cities (except New Delhi) preferred Singapore than Hong Kong when they planned to study overseas.

Strategies employed by HEIs

To recruit overseas students, Hong Kong higher education providers have adopted three types of promotion strategies. The programme strategies included the provision of high quality education services, exchange programmes, and scholarships to overseas students. The marketing strategies included joining education expos and undertaking school visits, adopting multi-methods for publicity and networking. The organizational strategies were to establish administrative office to support international education.

Inadequacies of exporting and internationalizing higher education

As expressed by stakeholders, the inadequacies of exporting higher education included diverse views towards the education hub policy across and within sectors, inadequate visibility of Hong Kong's HEIs in the Asian countries, inadequate policy infrastructure such as hostels and financial assistance to support the recruitment of non-local students, the introduction of the 3+3+4 academic system and the issue of social integration of non-local students into the community.

Facilitating factors

Hong Kong being a safe and politically stable city and an international and financial centre**,** its close relation with the Chinese Mainland and various types of freedom enjoyed by people are factors helping attract overseas students. In addition, the good quality of higher education services, English as medium of instruction, programmes with opportunities of international exposure, low tuition fees and adequate student support facilitate overseas students to pursue their studies in Hong Kong.

Recommendations

Based on the research findings, the report makes the following recommendations for enhancing the prospect of Hong Kong's development as a regional education hub.

At the system level, the government should be proactive in strategic issues related to the education hub policy by building on current structural arrangements and enhancing the capacity of various bodies. For example, the expertise in trade promotion and extensive global networking of the HKTDC can be used. The government could enhance the international competitiveness of Hong Kong's higher education through an increase in research funding and undergraduate enrolment rate.

Providing sufficient places of accommodation, sustaining and enhancing quality assurance of higher education are the major tasks of the government in attracting students from the target markets. Most importantly, the government could help enter into policy dialogues and international agreements at the G-to-G level. Furthermore, different sectors should share the responsibility to continue to sustain Hong Kong's attractions and help integrate non-local students into the local community.

At the institutional level, the HEIs could develop strategic positioning plans in the global operation, strengthen inter-institutional collaboration to build the image of Hong Kong, establish multiple channels for stakeholders to deliberate and develop a shared vision, and set up communication networks among institutional units for better liaison. It is recommended that the HEIs develop a flexible MOI policy to cater for student needs, devise flexible programme structure, delivery modes and tuition fee systems, and adopt a whole-campus approach to promote multicultural awareness and social support.

As for the structural policies, it is recommended that the Hong Kong government should establish a designated agency to take the lead in coordinating and organizing regular education exhibitions, joint universities promotion activities at other large-scale education exhibitions. The designated agency could help build up a database of information for important education exhibitions and establish a free up-to-date and user-friendly quality database of Hong Kong education. Moreover, the designated agency should establish offshore offices to provide overseas students with information and guidance services on studying in Hong Kong and collaborate with representatives from all HEIs to conduct market research.

CHAPTER ONE

INTRODUCTION

1.1 Background of the study

Internationalization becomes increasingly important in higher education in a globalized world.   Exporting higher education services by recruiting overseas students is an integral facet of internationalization of higher education.   Alongside this global trend, Hong Kong has embarked on developing itself into a regional education hub, and recruiting overseas students is an important part of this development.

In 2002, the University Grants Committee (hereafter, UGC) published the "*Report on Hong Kong Higher Education*", proposing that Hong Kong develops its capability to export higher education services and eventually becomes the "education hub" in the region. In his Policy Address in 2004, the Chief Executive said, "We are promoting Hong Kong as Asia's world city, on a par with the role that New York plays in North America and London in Europe". The University Grants Committee (UGC) then shared the Chief Executive's view and the vision of the Secretary for the Education and Manpower Bureau (hereafter, EMB) that Hong Kong could be developed as the education hub of the region in the higher education services sector (UGC, 2004). Due to Hong Kong's strong link with the Chinese Mainland, its cosmopolitan outlook, its internationalized higher education, and its geographical location, the UGC believed that, Hong Kong in Asia will have a key presence on the world map of higher education, and that internationally competitive centres of excellence with critical mass can be established in Hong Kong.

Following that, in response to the report of China's 11th Five Year Plan, the EMB (2005) also reiterated that Hong Kong is a strong candidate for becoming the regional hub of education by encouraging student exchange activities and facilitating the admission of non-local students, especially students from the Chinese Mainland, to study in the full-time accredited programmes at degree and above levels, both within and outside the UGC sector and sub-degree programmes on a personal basis. In this regard, the Hong Kong Trade Development Council (hereafter, HKTDC) published a research report on the potential of exporting higher education services to the Chinese Mainland in 2005 (Hung et al., 2005). In the 2006-2007 Policy Agenda, the EMB (2006) elaborated on the new and on-going initiatives in education, pointing out that a high-level inter-bureau steering committee chaired by the Chief Secretary for

Administration has been set up to examine the strategic issues relating to promoting Hong Kong as the regional hub of education. Such issues involve positioning and prioritizing the education hub policy including immigration control, boarding facilities, financial assistance, supporting local institutions to offer services outside Hong Kong and promotion strategies. On 10 October 2007, the Chief Executive Mr. Donald Tsang announced in his Policy Address increasing the percentages of non-local students in UGC institutions, allowing non-local students to work within the campuses and in summer and supporting more international schools in Hong Kong. These initiatives will further enhance the competitiveness of Hong Kong's higher education services in the region.

Given the multi-faceted nature of the development of Hong Kong as an education hub and its far-reaching implications, the project team initiated a research study in April 2007 to examine the emerging issues and challenges, following the analysis of conditions for developing education hub in early 2007 (Cheng, 2007). This study can provide insights for recommending corresponding strategies at system and institutional levels for the development of an education hub. Furthermore, given the intention of exporting higher education services to other countries, there is a need to refer to the international experiences and observations on the topic.

1.2   An international review: Exporting higher education

Exporting higher education seems to be a global trend among developed regions and countries. It not only helps develop a place as an education hub but also facilitates an internationalized environment of higher education. To attract non-local students to Hong Kong, there is a need to explore issues and challenges arising from the implementation of marketing strategies overseas, such as agreements on trade in educational services among members of the World Trade Organization (WTO). The following section will provide a background to the related concepts and key issues.

1.2.1   Internationalization of higher education

International education is one of the most significant service industries to emerge in the 1980s and 1990s. It is now becoming a global, market-oriented and private industry and therefore it needs to be managed and supported by clear strategies and policies at both system and institutional levels (Yonezawa, 2007). International trade in education services has expanded rapidly in recent years. It was worth at least US$30 billion in 1999 or about 3% of total trade in services in OECD countries (Carrington, Meek &

Wood, 2007). Today, universities establish linkages with each other in order to form alliances to be able to compete for funds, students as well as faculties (Chan, 2004). The formation of such strategic alliances among partners across national boundaries speeds up globalization. Marginson & Wende (2007) argue that globalization combines economic and cultural change. It entails the formation of world-wide markets operating in real time in common financial systems and cross-border mobility of production and also rests on the first world-wide systems of communications, information, knowledge and culture, tending towards a single world community. The impact of global changes cannot be easily fended off by national governments (Chan, 2004) nor can the development of hybrid world cultures created by the mingling of global-brand culture and indigenous traditions (Scott, 1998). Internationalization is, to a certain extent, a response to the impacts of globalization. Internationalization recognizes national borders and the uniqueness of individual societies and cultures and urges international understanding and cooperation (Chan, 2004).

Harman (2005) considers that internationalization of higher education usually refers to a range of activities such as the international movement of students between countries, international links between nation states through open learning programmes and new technologies, bi-lateral links between governments and higher education institutions (hereafter, HEIs) in different countries for collaboration in research, curriculum development, student and staff exchange, and other international activities, as well as export of education with students studying either in their home country or in the country of the providers. Hsiao (2003) regards internationalization of education as including international student recruitment, exchange of academic programmes, studying abroad, working abroad, internationalizing the curriculum, and student and professor exchanges. De Wit (2002) points out that the rationales and incentives for internationalization are influenced and to a large extent constructed by the role and viewpoint of the various stakeholders including international, national, and regional governments; the private sector; institutions; faculty; and students. While each of the above scholars has a distinctive perception and set of priorities regarding internationalization, there is also substantial overlap.

1.2.2   An increasing demand for international higher education among Asian countries

For the future, there is great potential for exporting Hong Kong's higher education services to Asian countries other than the Chinese Mainland. According to the Organization for Economic Co-operation and Development (OECD, 2007), Asian students will dominate the global demand for higher education. The education database of the OECD shows that among the 30 top sending countries, students from China, Korea and Japan studying in the OECD countries number in the first, second and third places respectively, Indian students are in the seventh, Malaysian in the ninth, Hong Kong in the twelfth and Indonesian in the fourteenth (Table 1.1).

Table 1.1 Share of tertiary foreign students in OECD countries

Countries	Share of tertiary students abroad within the OECD area
1. China	7%
2. Korea	5%
3. Japan	4%
4. Greece	4%
5. Germany	4%
6. France	3%
7. India	3%
8. Turkey	3%
9. Malaysia	3%
10. Italy	3%
11. Morocco	3%
12. Hong Kong China	2%
13. U.S.A	2%
14. Indonesia	2%

Source: From OECD Education Data Base as at 2007
http://www.oecd.org/document/54/0,3343,en_2649_37455_38082166_1_1_1_37455,00.html

In forecasting global demand for international higher education, Bohm, Davis, Meares and Pearce (2002) have found that the global demand for international higher education is set to grow enormously. The demand is forecasted to increase from 1.8 million international students in 2000 to 7.2 million international students in 2025. Asia will dominate the global demand for international higher education. By 2025, Asia will represent some 70% of total global demand and an increase of 27 % from 2000. Within Asia, China and India will represent the key growth drivers, generating over half of the

global demand in international higher education by 2025 due to their blooming economies.

Since such great demand for higher education among Asian countries is predicted, it is strategically important for Hong Kong to take into account the General Agreement on Trade in Services (GATS) to explore the possibility of developing Hong Kong as a regional education hub.

1.2.3   GATS and WTO– Suppliers of education services

Export of higher educational services has become one of the new realities of internationalization and it has aroused the attention of GATS. GATS is a WTO treaty that came into force in January 1995 as a result of the Uruguay Round negotiations. The treaty was created to extend the multilateral trading system to services, in the same way the General Agreement on Tariffs and Trade (GATT) provides such a system for merchandise trade (WTO, 2007a). Education is one of the twelve service sectors covered by GATS. Education services are included in the new services negotiations, which began January 2000 (WTO, 2007b).

The GATS agreement covers four modes of supply for the delivery of educational services in cross-border trade, namely Mode 1: cross-border supply, Mode 2: consumption abroad, Mode 3: commercial presence, and Mode 4: presence of natural persons. Modes 1, 3 and 4 can be regarded as outbound modes in which the provision of educational services and the establishment of commercial facilities are cross borders and the services providers and professors are working aboard to render service. Mode 2 is regarded as an inbound mode where the students move to the country of education services suppliers (Table 1.2).

Countries can, in principle, freely decide where to liberalize on a sector-by-sector basis, including which specific mode of supply they want to use for a given sector. However, the target of those driving the negotiations is often total liberalization. Member countries' commitments are governed by a "ratchet effect" meaning that commitments are one-way and cannot be wound back once entered into.

According to the Centre for Educational Research and Innovation (2007) of OECD, cross-border higher education is becoming an intriguing but very complicated phenomenon. The mobility of students, university faculties, knowledge and even values has been part of higher education for many years. However, there has been significant growth in the mobility of higher education programmes and providers through physical

and virtual modes of delivery in the last two decades. Many new opportunities of increased access to higher education, transnational strategic alliances and the expansion of human resource and institutional capacity have arisen.

Table 1.2 Four modes of supply of education service

Modes	Criteria and examples	Supplier Presence
Mode 1: Cross-border supply	Service delivered within the territory of the Member, from the territory of another Member (distance education, e-learning, virtual universities)	Service supplier not present within the territory of the member
Mode 2: Consumption abroad	Service delivered outside the territory of the Member, in the territory of another Member, to a service consumer of the Member (Students go to another country to study)	
Mode 3: Commercial presence	Service delivered within the territory of the Member, through the commercial presence of the supplier (Local branch or satellite campuses, twinning partnerships, franchising arrangement with local institutions)	Service supplier present within the territory of the Member
Mode 4: Presence of a natural person	Service delivered within the territory of the Member, with supplier present as a natural person (Professors, teachers, researchers working abroad)	

Source: Retrieved from http://www.wto.org/english/thewto_e/thewto_e.htm as at 9 September 2007; Knight (2002)

1.2.4   Strategies of promoting higher education

For many students and families, deciding to study abroad is one of the most expensive and important initiatives they have undertaken. Problems of promotion may emerge due to differences among different Asian countries. For instance, India is quite different from Indonesia in terms of English language ability. Thus the international promotion strategy of an education institution needs both sophistication and sensitivies. A review of the relevant literature has identified factors critical to the success of education institutions operating in international markets.

First, it is of paramount importance to pay attention to the quality of higher education. Mazzarol & Hosie (1996) state that developing an image of quality of the curriculum and a reputation for quality of the institution in the Asian countries is an essential starting point for elaborating strategies for marketing international education. It can help develop good level of recognition leading to comparative advantage in the market. Mazzarol (1998) has found that the ability of institutions to recruit quality staff can also be a critical success factor. Moreover, forming international strategic alliances will help lower the cost of establishment (Mazzarol & Hosie, 1996). Giggs (1993) highlights that

a "twinning arrangement" where two institutions set up an alliance and collaborate in the provision of degrees can help enhance quality and comparative competitiveness in the Asian countries. If the institution possesses offshore teaching programmes and recruiting offices in the Asian countries, it can help facilitate enrolments and eventually help generate funds for the institution (Nelson, 2002).

In addition, competitive advantage can be achieved through effective use of information technology and technical superiority (Mazzarol & Hosie, 1996). Technologically mediated learning can help reduce education time compared with traditional teaching methods (De Blooies, 1988). Since offices and homes throughout the world are linked by tele-communications and information technology network, greater use of open learning and distance learning via multimedia will be feasible for exporting higher education overseas (Lundin, 1993).

Effective use of government promotion agencies can also contribute to exporting higher education. The governments of Australia, Canada, the UK and the USA have made considerable investment in setting up and maintaining professionally-run, well-resourced education information and promotion centres in the Asian countries (Mazzarol, 1998). The importance of financial support from the government and financial performance of a tertiary institution has been highlighted in the literature (Buzzell & Gale, 1987; Mazzarol & Hosie, 1996). To manage quality, the government can play a role in assisting higher education providers to obtain sufficient funding to undertake research programmes of an international standard. As for agents who help promote higher education overseas, Davis (1989) points out that relying heavily on private recruiting agents will involve risks to a certain extent as there have been some instances of unethical practice. There is a need to recognize the differences between overseas markets so as to adopt different market entry strategies (Smart, 1988). The possession of a strong alumni base, size of student population, size of campus and possession of a large market share have been viewed as sources of competitive advantage in marketing and promoting higher education services of a country (Mazzarol, 1998).

To promote higher education overseas, Brown (1984) developed a model of "Steps in Marketing Programme" that was further extended by Hsiao (2003) to include the following steps; (1) programme recognition and definition; (2) objectives; (3) marketing segmentation; (4) strategies; (5) implementation, and (6) evaluation and control.

Knight and de Wit (1995) and de Wit (2002) conceptualize two categories of strategies for the internationalization process of higher education, namely, programme strategies and organizational strategies. Programme strategies refer to those academic activities and services of a higher education institution that incorporate international dimensions such as provision of student exchange, joint degree programmes and international student programmes, research and scholarly collaboration, provision of student scholarship programmes and development of profit-based courses or programmes, distance education programme, offshore programmes and campuses. Organizational strategies, on the other hand, refer to the commitment and support of the governors and senior administrators of the HEIs, the support and involvement of a critical mass of academic staff, adequate funding support, incentives and rewards for staff, as well as the cultural and social environments. It has been stressed that equal attention has to be given to both the programme strategies and organizational strategies.

The above international experiences in promoting higher education overseas can provide a good reference for Hong Kong to develop its own strategies in the context of Asia region.

1.2.5   Issues and challenges of exporting higher education services

While Hong Kong has taken steps towards developing as an education hub through exporting higher education services to the Asian region, there are still challenges in promoting higher education overseas that require Hong Kong to revisit different aspects of their policy on internationalized tertiary education. For example, the Education Bureau (EDB) (2007) of Hong Kong has issued new regulations for non-local courses registry, and frameworks for quality assurance and private higher education.

In fact, the growth in the mobility of higher education programmes and providers has the potential to lead to an increase in low quality or rascal providers and agents, and a lack of recognition of foreign qualifications by domestic employers or education institutions which will create numerous tensions (Centre for Educational Research and Innovation, 2007; Meek, 2002).

The research conducted by Romm, Patterson and Hill (1991) confirmed that failure of social interaction with domestic students was a major source of course dissatisfaction for international students. Indeed, recent research findings indicated that there are a number of other factors that affect the study life of overseas students, such as students' aspirations, perception of their courses and institutions, impact of culture and values on

learning environments, learning autonomy and styles of learning (Harman, 2005). Teaching methods especially suitable for international students have also drawn researchers' attention (Lilley, 2001).

Knight (2002) has identified some possible barriers related to the four modes of supply of education services indicated by GATS. In the mode of "Cross Border Supply", there may be inappropriate restrictions on electronic transmission of course materials, excess fees or taxes imposed on licensing or royalty payments, requirement to use local partners and lack of qualified degree granting institutions. In the mode of "Consumption Abroad", insufficient financial support to students, visa requirements, and costs of living are of paramount importance, while quotas on numbers of international students, restrictions on employment while studying and recognition of new qualification by other countries are salient impediments. In the mode of "Commercial Presence", the possible barriers include high subsidization of local institutions, measures requiring the use of local partners, rules for twinning arrangements, tax treatment which discriminates against foreign suppliers, and difficulties in obtaining authorization to set up facilities. Finally, immigration requirements, nationality requirements, employment regulations, recognition of credentials, quotas on number of temporary staff, and restrictions on the use of educational materials by foreign tutors are probably barriers in the mode of "Presence of Natural Persons".

Due to the expansion of international education market, there have been several impediments for further marketing such as an increase in tuition fees, government regulation covering immigration, lack of information on international competitiveness of local education providers, low priority of liberalizing education markets among WTO members, the absence of international standards for quality assurance and accreditation in higher education, lack of international agreement to protect intellect property and the political pressure from non-government organizations to oppose the liberalization of education services (Carrington, Meek and Wood 2007).

The international issues and challenges in exporting higher education services provide some useful insights for policy makers and stakeholders of higher education in Hong Kong to consider policies and strategies for developing Hong Kong as a regional education hub.

1.2.6   Experiences of Australia and Singapore in exporting higher education services

To promote an institution's higher education, there is a need to obtain sufficient, reliable and timely information on the education activities and national education systems of potential competitors (Mazzarol, 1994). In this regard, to develop Hong Kong as an education hub, the experience of Singapore and Australia in exporting higher education services should be taken into account. The following discussion will provide background information on what these two countries have been doing in promoting their higher education in the region.

The expenditure on research and development (hereafter, R & D) of a country can have a positive impact on both its technological advancement and its higher education sector. Whilst Hong Kong spent only about 0.79% of her GDP on research and development in 2005, the figures for Singapore and Australia are 2.4% and 1.76% respectively (Legco, 2008). A table showing R & D expenditures as a percentage of GDP of different economic systems is given below.

Table 1.3 R & D expenditure as percentage of GDP (2005)

Economic Systems	Research and Expenditure Expenses as % of GDP
1.Japan	3.53
2.U.S.A	2.68
3.Korea	2.63
4.Switzerland	2.57
5.Taiwan	2.52
6.Singapore	2.36
7.Australia	1.76
8.United Kingdom	1.76*
9.Chinese Mainland	1.34
10.Ireland	1.33
11.New Zealand	1.17
12.Hong Kong	0.79

Source: Legco Paper, 2008, retrieved as at 21 February 2008 from
http://www.legco.gov.hk/yr07-08/chinese/fc/fc/papers/f07-46c.pdf
*The U.K. data here is retrieved from National Statistics (2007)

It should also be noted that Singapore has worked assiduously to expand subsidized university places to her student cohort. In 2007, for example, 23.5% of the student cohort was offered first degree places in the three universities. This represented

significant improvement over the 20.8% achieved in 2000 and the 15% achieved in 1990. This outstrips Hong Kong's 18%. The target of Singapore at the time of this writing is 25% but in a speech given on 19th August, 2007, Prime Minister Mr. Lee Hsien Loong further explained that the aim will be further raised to 30% by 2015 (Ministry of Education, Singapore, 2008). Singapore has also encouraged her polytechnics to link up with foreign specialised institutions to offer degree programmes in niche disciplines. An example is Ngee Ann Polytechnic's joint venture with Wheelock College from the U.S.A to offer a degree programme in early childhood education.   Australia too has tried to increase the number of university places in recent years. An increase in university places can enhance both the general educational level of the society and the capacity of the HEIs. These can be helpful in attracting non-local students.

Australia offers scholarships to international students on a competitive basis. There are a number of scholarship programmes under the government initiative known as Australian Scholarships. These programmes aim at high-achieving students, researchers and professionals, and developing leaders. Examples of such scholarships include the Endeavour Programme which is meant for outstanding students; Australian Leadership Awards for future leaders; and Australian Development Scholarships for promoting good governance and development of the developing countries (Study in Australia, 2008).

Whilst the Australian government hands out scholarships and grants on a competitive and selective basis, the Singaporean government offers a comprehensive package of financial aids to non-local students. The Singaporean government offers scholarships to non-local students through the Singapore Scholarship. Besides scholarships, non-local students can also apply for Tuition Fee Grant if they are willing to sign a deed that requires them to work in a Singapore-registered company for three years upon completion of study. The Tuition Fee Grant administered by the Ministry of Education (MOE) subsidizes up to 80% (Singapore Education, 2007) of tuition fees and is available to all students. Bursaries, which are administered by the universities, are also available based on financial needs, and usually do not exceed S$1,500 per academic year. Besides, study loans, payable upon graduation or completion of the programme, are often available at favourable interest rates. The scholarships Singapore offers can be important in attracting non-local students.

The Australian government leaders have taken an active role in securing international agreement with other governments to further promote their higher education. Australian government officials have visited many developing countries such as India, Indonesia,

China, Pakistan and Malaysia to discuss higher education collaboration. The Australian government has also facilitated dialogues between governments on educational matters.

Singapore is no exception in this regard. The Singaporean government has worked together with different countries to pursue her goal of becoming a regional hub of education. The government of Singapore and Johns Hopkins Medicine reached an agreement in 1998 to develop the first private medical facility which combined research and teaching with clinical services in Singapore. The Singaporean government also signed a Memorandum of Understanding (MOU) with other Asian countries like Vietnam and Malaysia for strengthening each other's knowledge in subjects such as sciences and mathematics, information and communication technology, school leadership and educational administration (Ministry of Education, Singapore, 2007). It should be noted that Singapore has been active in reaching agreement with, and attracting, renowned overseas universities to set up campus in Singapore and this also spearheads Singapore's drive to become a regional hub of education. Apart from Johns Hopkins Singapore, examples comprise the University of New South Wales and the Chicago Graduate School of Business.

The Australian government increases funding for institutions in areas such as education, science and training courses without any conditions in order to reform the university landscape and improve their quality. Extra investment in higher education is made to universities that can improve flexibility for student enrolment, course design, or can prove their needs for structure reform etc. (Budget Information, 2007).

The Singaporean government has launched the *Singapore Education* awards to motivate more industry collaboration and exchange of best practices and ideas. The awards are managed by the Singapore Tourism Board. The awards encourage members to strive for higher levels of professionalism in the promotion of Singapore education to overseas students. The awards cover a wide range of areas. Examples of such awards include Best Media Coverage for *Singapore Education*, Best International Marketing Effort, Best Host for International Students Studying in Singapore, Best Educational Event Organized by a Public Educational Institution and Friend of International Students (Singapore Tourism Board, 2007).

Both Singapore and Australia have central agencies, either government units or public bodies supported by public funds, to facilitate their export of educational services. The central agency that works to promote higher education in Australia is Australian Education International (AEI). AEI is a part of the Department of Education,

Employment and Workplace Relations (DEEWR) (formerly known as the Department of Education, Science and Training or DEST). Its purpose is to promote Australian higher education strategically based on the needs of the national interest. AEI helps establish government relations by developing Memorandum of Understandings and facilitating dialogue on education issues with governments around the world. Its international staff works to enhance Australia's profile by working with international gatekeepers and students. It also reports on market information to the sectors involved and carries out research on the markets. It promotes Australian education overseas by brand positioning and by making use of the website "Study in Australia", promotional events, and in-country promotional campaigns. Other activities include industry regulation through protecting international students' tuition fees and ensuring that HEIs follow the national code of practice. AEI also provides assessment services and offers advice on recognition of educational and professional qualifications from around the world.

In Singapore, *Singapore Education* is a multi-government agency initiative launched by the Singaporean government in 2003 to promote Singapore as a regional education hub. The government agencies discussed here are actually statutory boards or semi-independent agencies that specialize in carrying out plans and policies of the Ministry of Trade and Industry (MTI). *Singapore Education* is led by the Singapore Economic Development Board. Under this drive, different government agencies work together to facilitate the export of Singapore's education services. The Singapore Economic Development Board works to attract internationally renowned educational institutions to set up campuses in Singapore.

The Singapore Tourism Board (STB) runs an Education Services Division with the specific aim of promoting Singapore as a premier education hub and of helping international students to make informed decision to study in Singapore. STB helps increase brand awareness and reach out to the Asian countries. Apart from participating in overseas education fairs, it has organized different promotional activities, such as international conferences and road show events. Recent examples of international academic conferences held in Singapore are the 5th Asia Pacific Medical Education Conference held in the National University of Singapore in January of 2008; and the APS Global Education Conference supported by the Ministry of Education and held in July 2007. Another international seminar, the 43rd Regional Language Centre (RELC) International Seminar was held in April, 2008. There were representations from both the East (Malaysia, Singapore, Thailand and Vietnam etc.) and the West (Australia, Canada, Germany and France etc.). The main purpose of the seminar was to provide

constructive direction to the forces and the challenges of change in the contemporary world through joint and cooperative efforts for regional educational development.

In Singapore, the Education Services Division comprises three units, each with its specific terms of reference. The Education Market Development (EMD) handles the organization of education exhibition and seminars, training of education counselors, and cultivation of international media. Education Strategic Marketing (ESM) helps with brand advertising and publicity, competitive analysis and research, and industry capability development. Finally, Student Services (SSD) looks after services for students who have gone to Singapore for study in areas such as education counseling, orientation programmes and student feedback.

Apart from the Singapore Economic Development Board and the Singapore Tourism Board, there are other government agencies that help to promote the export of education services of Singapore. International Enterprise Singapore helps quality schools in Singapore to develop their businesses and set up campuses overseas. Spring Singapore, on the other hand, administers quality accreditation for private education organizations in Singapore.

In Singapore, programmes for attracting talented and skilled people include: 1) Landed Permanent Resident (LPR) for people with professional / tertiary qualification from a famous institute, 2) Approval In Principal (AIP) for the people of Hong Kong, 3) Foreign Artistic Talent Scheme for people who have talents in arts, photography, dance, music, theatre, literature, and film etc, 4) Professionals/Technical Personnel & Skilled Worker Scheme (PTS) for people who have already been working in Singapore on a stable and dependable job with a valid Employment Pass, and 5) Deposit Scheme for entrepreneurs (SMC Singapore Immigration, 2006)

Due to the declining birth rate and the influence of globalization, attracting skilled/talented people is obviously the purpose of both countries in setting up of the immigration schemes. Young and professional people are in great demand in our competitors' countries to help make those countries' economies vibrant and competitive.

In Australia, the local higher institutions offer various forms of collaborative / joint degrees with other countries. Among them, dual and collaborative degree programmes are very popular. Australian universities have searched for different opportunities for cooperation with other countries, especially with some Asia-Pacific countries such as

Indonesia, China and others (AEI Indonesia Newsletter, 2007; Group of Eight, 2007). According to the reply we got from the Australian consulate in Hong Kong, joint programmes of Australian institutes with China and other countries are carried out under strict regulations. This helps guarantee the standard of the co-operation.

Collaborative/Joint degrees have also become important in Singapore (McPhee, 2005). The National University of Singapore (NUS) collaborates with Duke University, U.S.A to establish a graduate medical school in Singapore (Overland, 2005). The NUS cooperates with Georgia Institute of Technology in offering a dual MS degree in logistics (Rollins, 2007). The National University of Singapore and Nanyang Technological University have allied with Massachusetts Institute of Technology in offering high-tech programmes such as Advanced Materials and Micro- and Nano-System, and Molecular Engineering, etc (Singapore-MIT Alliance, 2007).

In brief, the experiences, policies and strategies of Singapore and Australia in exporting their higher education and establishing themselves as education hubs in the Asia-Pacific region provide fruitful insights and sophisticated models for Hong Kong policy makers and higher education providers to consider their ways of development.

1.3 Objectives and significance of the study

The overview of the export of higher education services and the internationalization of higher education in the international context provides the project team with an overall background of the issues, challenges and experiences in promoting higher education, especially in the Asian Pacific region. The experiences of Singapore and Australia render the team insights into the process of developing an education hub. This study aims at examining the current provision of higher education services for non-local students in Hong Kong, investigating the factors facilitating and impeding international students particularly of three selected Asian countries to study in Hong Kong, identifying the related issues and challenges, and finally making policy and strategy recommendations at both system and institutional levels for the development of Hong Kong as a regional education hub.

This study is significant in three aspects. First, identifying the issues and challenges expressed by various stakeholders and the needs of prospective international students from three selected Asian countries, namely India, Indonesia and Malaysia will enable us to seek effective strategies to enhance the prospect of Hong Kong's promoting of higher education services and to better position Hong Kong to become an education

hub in the region. Second, the recommendations made in this report will contribute to the ongoing policy debate and discussion in the Hong Kong community and the continuing endeavour of internationalization of higher education in the Asia Pacific region. Thirdly, as exporting higher education overseas has become increasingly important in many developed countries, the study will add to the international literature and understanding on this timely topic.

1.4   Outline of the report

This report is divided into four major sections. The first chapter gives the background to this study and presents an overview of international experiences and issues on exporting and internationalizing higher education services with Singapore and Australia as illustrative cases. The second chapter describes the research design of the study including the framework of the study and methods employed for data collection. The findings of the current provision of higher education services for non-local students in Hong Kong, the factors that facilitate or hinder international students to consume higher education services in Hong Kong as well as the conditions and suggestions proposed by various stakeholders for developing an education hub are presented in Chapters three and four. Finally, recommendations drawn from the analysis and findings on appropriate measures and strategies at both system and institutional levels for the development of Hong Kong as a regional education hub are put forward in Chapters five and six.

CHAPTER TWO

RESEARCH METHODOLOGY

2.1   Framework of the study

Figure 2.1 sets out the conceptual basis and organization of the study. The operation has three phases, namely "Phase 1: Field Work and Data Collection", "Phase 2: Analysis and Findings" and "Phase 3: Final Report".

Figure 2.1 Conception and organization of the research

Phase 1: Field Work and Data Collection

(A) Study Exportable Higher Education Services in HK:

- Recent developments in attracting non-local students to HK
- Types and characteristics of higher education providers in HK
- Types of government and non-government subsidized higher education services exportable and potentially exportable in HK
- Specific student profiles of exporting higher education services in HK
- Incentives, inadequacies, issues & challenges of developing HK as an education hub
- Case studies of HK higher education providers entering the Asian markets

Methods:

- Analysis of related programme documents, education-export policies, etc. in HK
- In-depth individual Interviews, focus groups interviews, survey questionnaires with stakeholders including providers (tertiary & non-tertiary sectors, etc), policy and concerned bodies (e.g. EDB, TDC, UGC, etc.), Consulates General and inbound students

(B) Study Conditions of Target Markets in Asia*:

- Overseas higher education needs of the students in Asian Countries outside the Chinese mainland, typically including Malaysia, Indonesia & India (primary focus) and elsewhere (secondary focus)
- Types of overseas educational services the target markets need in HK
- Conditions/ factors that facilitate or hinder students in the target markets to consume higher education services overseas, particularly in HK

Methods:

  On-site surveys and interviews with parents and students during international education fairs in India (New Delhi, Mumbai), Indonesia (Jakarta), & Malaysia (Kuala Lumpur)

Phase 2: Analysis and Findings

- Describing current provision of higher education services for international students   in HK
- Describing factors that facilitate or impede target customers to study higher education in HK
- Identifying issues, challenges and attractions of the development of HK as an education hub
- Making policy and strategy recommendations at system and institutional levels for the development of an education hub

Phase 3: Final Report

*This part of study had been used to contribute to another project commissioned by TDC in 2007 (Cheng, et al., 2008)

2.1.1   Phase 1: Field work and data collection

Phase 1 was mainly on collecting data from (1) various higher education stakeholders including providers (tertiary & non-tertiary sectors, etc), policy and concerned bodies (e.g. EDB, HKTDC, UGC, etc.), Consulates General and inbound students, and (2) on-site surveys in the international education fairs and off-site surveys of local communities with students and parents in India (New Delhi, Mumbai), Indonesia (Jakarta), & Malaysia (Kuala Lumpur).   The study began with an overview of recent developments in higher education services in attracting non-local students to study in Hong Kong. This included the types and characteristics of higher education services providers involved, types of education services and courses that are currently offered in Hong Kong, and types of non-government subsidized higher education services exportable and potentially exportable in Hong Kong. The overview also contained specific profiles of inbound students, case studies of best practice of Hong Kong higher education providers entering Asian countries, and most importantly description of factors such as incentives, issues and challenges of developing Hong Kong as a regional education hub.

2.1.2   Phase 2: Analysis and findings

In Phase 2, the focus was on analyzing data collected from Phase 1. Data analysis was composed of the following steps: (1) describing current provision of higher education services for non-local students in Hong Kong; (2) identifying incentives, issues and challenges of the development of Hong Kong as an education hub; and (3) making policy and strategy recommendations at both system and institutional levels for the development of an education hub.

2.1.3   Phase 3: Final report

The final report was written up with reference to the findings analyzed and interpreted from the data collected in the first and second phases.

2.2   Methods of data collection

To understand the holistic situation of the opportunities for developing Hong Kong as a regional education hub through understanding the current situation of higher education providers in Hong Kong and the conditions of three selected Asian countries, five key methods—namely in-depth interviews, focus group interviews (hereafter, FGIs),

document analysis, questionnaire survey and case studies were used both in Hong Kong and in three selected Asian countries.

2.2.1   In-depth interviews and FGIs

In-depth individual interviews and FGIs were the main methods adopted to collect data. There were various sets of interview questions for different stakeholders such as higher education providers, policy makers, Consulates General and non-local students in Hong Kong and in the selected Asian countries. FGIs were usually employed with groups of non-local students. The project team designed an interview schedule in which open-ended questions covering all major areas stated in Phase 1 were included (Appendix A1). The length of each interview lasted about an hour.

2.2.2   Document collection

Relevant documents regarding higher education provision and regulations were collected from government officials in Hong Kong and from the website of those specified policy makers and higher education providers. These documents yielded insights into the current practices and situation of higher education provision and policies in Hong Kong.

2.2.3   Survey questionnaires

A small scale survey with a sample of 55 tertiary students from the Chinese Mainland and other overseas countries and another large scale one with more than 1,000 students were conducted in Hong Kong and in three selected Asian countries respectively. They were sampled by means of convenience and snowball sampling methods. The survey questionnaire consisted of five major sections: (1) need for pursuing higher education overseas, including types of degrees and overseas countries preferred; (2) types of educational services; (3) factor facilitating or hindering students to study in Hong Kong; and (4) promotional activities of Hong Kong's higher education (Appendix A2). Since English is served as a dominant world language, the survey questionnaire was provided in English in India and Malaysia. However, due to limited English proficiency of many prospective students and parents in Indonesia, the survey was administered in local language.

2.2.4   Sampling

2.2.4.1   Hong Kong

Government funded and non-government funded higher education providers, policy makers including representatives of Immigration Department, the HUCOM Standing Committee on Internationalization (hereafter, HUCOM representative), Education Bureau (hereafter EDB) and UGC, Consulates General of India, Malaysia and Indonesia and non-local students were selected for in-depth individual interviews or FGIs according to the procedures of purposeful sampling suggested by Lincoln & Guba (1985). They were chosen because the project team identified that they would provide thickness of information and maximum variations to the analysis concerning the current situation and expectation on Hong Kong's higher education services. Each sample was chosen "to extend information already obtained, to obtain other information that contrasts with it, or to fill in gaps in the information obtained so far" (Lincoln & Guba, 1985, p.201). Snowball sampling was employed in interviewing non-local students. After each interview, the project team members invited each non-local student to introduce another one for interviews. Sampling was completed when the data obtained from previous respondents were replicated and repeated by additional interviewees.

Though the period of data collection ranged mainly from May 2007 to January 2008, it is worth noting that data of all interviews had almost been completed before the Policy Address in October 2007 in which some new measures for developing Hong Kong as an education hub were announced by the Chief Executive. The project team conducted interviews, FGIs, case studies, a questionnaire survey and document analyses in Hong Kong as specified in Table 2.2.

The project team conducted a total of 74 interviews, out of which 21 were with HEIs funded by the University Grants Committee, two with non-UGC funded HEIs, five with local policy makers, 30 with non-local students, three with alumni, three with Consulates in Hong Kong, three with official agents of other exporting countries, and seven FGIs with non-local students. There were a total of three case studies conducted with non-UGC funded education services providers. Sixteen documents were also collected from the local HEIs, Hong Kong policy bodies, and foreign education services providers. In addition, the project team also conducted a survey of non-local students and alumni in Hong Kong. A total of 55 participants were involved. The participants were non-local students studying in universities in Hong Kong. They were mainly post-graduate students.

Table 2.2 Samples and data collection in Hong Kong

Interviews

Stakeholders	Number	Total
- UGC funded HEIs	21	21
- Non UGC funded HEIs	2	2
- Local policy makers/advisers	5	5
- International competitors	3	3
- Non-local students in HK	30	30
- Consulates	3	3
- Alumni	3	3
Total		**67**

FGI

	Number	Total
- Non-local students in HK	7	7
Total		**7**

Survey questionnaires

Stakeholders	Number	Total
- Non-local students in HK*	49	49
- Alumni	6	6
Total		**55**

Case Studies

	Number	Total
- Non UGC funded HEIs	3	3
Total		**3**

Documents

	Number	Total
- Local HEIs, Hong Kong policy body, & foreign education services providers	16	16
Total		**16**

* Note: Not yet included those 1,370 respondents surveyed in the four Asian cities

2.2.4.2   Selected Asian countries

From April 2007 to January 2008 the project team conducted questionnaire surveys in four cities of three selected Asian countries—Mumbai, New Delhi, Jakarta, and Kuala Lumpur. There were a total of 1,370 questionnaires being collected in this study. The survey respondents in selected Asian countries included that of the onsite expos and the offsite local community. 900 questionnaires have been collected at education expos and 470 from the local communities (Table 2.3 refers).

Table 2.3 Data collected in four cities of three selected Asian countries

Cities Countries		Mumbai, India	New Delhi, India	Jakarta, Indonesia	Kulua Lumpur, Malaysia
Expo	Questionnaire Surveys (Student and Parents)	187	248	220	245
Local Community	Questionnaire Surveys (students)	90	63	83	234
	Total	277	311	303	479
		1,370			

It should be noted here that to be in line with the method of categorizing overseas students in tertiary institutions adopted by the UGC of Hong Kong, the category of non-local students used in this study refers to students from the Chinese Mainland and other countries of the world. For students from the Asian region, the UGC divided them into students from the Chinese Mainland, which form the bulk of non-local students in Hong Kong, and those from other Asian countries. The student samples chosen for this study were mainly those from selected Asian countries other than the Chinese Mainland, including India, Indonesia and Malaysia plus a few from other Asian countries because, to develop Hong Kong as a regional education hub, it is necessary to promote her higher education services to other Asian countries in addition to the Chinese Mainland.

2.3   Data analysis

The study generated both qualitative and quantitative data.   The qualitative data from the interviews were transcribed and reviewed by the project team.   Recurring themes and relevant information were grouped into categories in the findings sections. Analysis of the quantitative data was assisted by a computer programme – Statistical Package for Social Science (SPSS version 12). The findings informed the inductive analysis of the present study.

2.4   Limitations of the study

The study focused on identifying issues, challenges, and recommendations in the development of Hong Kong as a regional education hub. There were several limitations of this study. First, it proved difficult to locate non-local students in Hong Kong from selected Asian countries, especially the alumni. While this provides a clue about the relatively small size of the non-local student population from selected Asian countries, caution is needed to interpret the findings generated because of the small number of respondents, especially in the questionnaire survey.

In addition, the project team found it difficult to gain access to some departments of some institutions for interviews or descriptive data. Furthermore, the three Hong Kong case studies presented in Chapter Three were confined to MBA programmes and were exemplary practices and are not intended for generalization. However, these findings might shed light on other similar groups or illuminate some implications for the current situation of higher education. As for data collection in three selected Asian countries, random sampling was not possible for both survey questionnaires and interviews due to difficult access to certain stakeholders and schools in these countries. Thus, the results were directly descriptive to the sample groups and the findings of the study were only indicative, not conclusive. Having said that, we believe our findings could generate insights into cities with similar characteristics and demographics.

Given that the context of higher education in Hong Kong is changing very fast, the collected data and findings of this study may be outdated easily in a short time. It is not a surprise that some of the raised issues and proposed recommendations may have been addressed to some extent at the time of the report being completed and openly distributed for public consumption in the local community.

2.5 Summary

This chapter has provided a detailed account of the methods employed in this study. Data were collected mainly by semi-structured interviews, document analyses and survey questionnaires. These various data sources complemented each other, and thus provided a better portrait of the current situation of the needs for Hong Kong higher education providers and implications for the development of Hong Kong as an education hub. In addition, the chapter has defined some of the limitations of the study. The next chapter will report the preliminary findings.

CHAPTER THREE

CURRENT PROVISION OF HIGHER EDUCATION FOR NON-LOCAL STUDENTS IN HONG KONG

3.1 Introduction

This chapter portrays the current provision of higher education for non-local students in Hong Kong. The findings reported are based on data collected from April 2007 to January 2008. Face-to-face interviews, supplemented by telephone interviews and written responses to interview questions, with various groups of stakeholders were the major data collection method. Stakeholder groups include respondents from the HEIs in Hong Kong, representatives from policy making and concerned executive bodies, including the EDB, UGC, HKTDC, the HUCOM representative, and Immigration Department, Consulates of Malaysia, Indonesia and India, as well as non-local students and alumni. Apart from interviews with various stakeholder groups, a questionnaire survey was conducted with inbound students. Besides, some data information was sought on websites and in education commentaries by scholars in tertiary institutions of Hong Kong.

3.2 The policy of inbound provisions for higher education

The role of the EDB is to formulate the policy of exporting and promoting higher education, and then the UGC helps co-ordinate the eight UGC-funded institutions for the implementation of the policy (Appendix B, R2).

3.2.1 Inbound provisions

Exports of Hong Kong's higher education services can be provided either by inbound or outbound methods in accordance with the GATS agreement. However, there is no outbound provision of higher education services to South East Asian countries by any Hong Kong tertiary institution currently, except several establishments in the Chinese Mainland and Taiwan (Appendix B, R1). Thus, the present focus of exports of higher education is on inbound consumption – non-local students coming to Hong Kong to pursue higher education (Appendix B, R2).

3.2.1.1   Purposes of exporting higher education

For some countries, the purpose of having an exporting higher education policy is profit-making in order to subsidize their own tertiary education. Hong Kong is trying to develop as a regional education hub through inbound provision of higher education services, the main objective of which is not money-making but rather is on attracting talented students from other countries, and creating an internationalized environment on the campus of local institutions so that Hong Kong students can broaden their horizons during the course of their studies (Appendix B, R2 & R10). Internationalization means to internationalize the academic structure, explore the opportunities of more collaborative programmes with overseas universities and invite more exchange students. Offering quality programmes, for example, to attract quality students to study in Hong Kong is of paramount importance during the process of internationalization. Local universities are motivated to recruit more international students to help boost the brand-name of higher education in Hong Kong and enhance benign competition between local and non-local students to promote excellence (Appendix B, R1).

3.2.1.2   Admission quota for non-local students

The admission quota is a key policy measure for the recruitment of non-local students. Since the 2005/06 academic year, the quota for admitting non-local students at UGC-funded institutions has been set at 10% of the approved UGC-funded student number targets at sub-degree (SD), undergraduate (Ug) and taught postgraduate (TPg) levels (The quota has been increase to 20% which was announced in the Policy Address 2007 by the Chief Executive. Please refer to Section 4.6). Among the 10% admission quota for non-local students, 4% of the quota falls within the UGC-funded student number targets. The rest (6%) of the quota can be used by HEIs to recruit non-local students in addition to the UGC-funded places. The UGC has laid down a guiding principle of admission to ensure a proper mix of local and non-local students in HEIs' use of this admission quota (Appendix B, R3). Currently, there are approximately 14,500 publicly-funded first-year undergraduate (Ug) places in eight UGC-funded institutions.

The 10% admission quota policy allows UGC-funded institutions to admit 580 non-local students with the publicly-funded student number targets and 870 non-local students in addition to the UGC-funded places. The TPg programme still falls into the 10% admission quota policy if it is publicly funded. However, there is no quota restriction on recruiting non-local students if the TPg programme is run on a

self-financed basis. HEIs have been allowed to admit non-local students at the research postgraduate (RPg) level without quota restriction since late 2002.

3.2.1.3 Tuition fee for non-local students

Though non-local students enrol in UGC-funded programmes, they pay a higher tuition fee than local students (Table 3.1).

Table 3.1 Tuition and accommodation fees per year for non-local students in 8 UGC-funded institutions as at September 2007

Institutions	Tuition	Accommodation
City University	HK $60,060 for UGC programme undergraduate per year	HK$ 7254 per semester
Baptist University	HK$60,000	HK$11,000 (A double occupancy room at the Student Residence Halls for 10 months]
Hong Kong University (HKU)	HK$70,000	HK$75,000 including living expenses, books etc.
Lingnan University	HK$60,000 per academic year	HK$8,890 per year* (except summer period)
The Hong Kong Polytechnic University (HKPU)	HK$ 70,000 per academic year	HK$40 per day per person
The Chinese University of Hong Kong (CUHK)	HKD $80,000 per year	HKD $7,500 per year
The Hong Kong University of Science and Technology (HKUST)	HK$80,000 per year	$9,600 per person in double room $7,190 per person in triple room For nine months
Hong Kong Institute of Education (HKIEd)	$60,000 per annum for non-local student	Semester Rate per unit HK$4,750 + HK$150 Hall Life Education fee

Source: Figures retrieved from the websites of the 8 funded institutions as at September 2007

Non-local students studying Ug programmes pay an average of HK$60,000 to HK$100,000 tuition fee per year (Appendix B, R4) in the eight UGC funded institutions which is about HK$15,000 more than that paid by local students. This amount of tuition fee shoulders only 25% of the average unit cost of a university Ug place funded by the government. On the other hand, the tuition fee of a private university in Hong Kong is about HK$49,000 per year (Appendix B, R5).

Some of the institutions raised their tuition fee in year 2007-2008 but they offered scholarships to those non-local students. Therefore, a large group of them did pay no, or less, tuition fee than that posted on the university website. Table 3.1 summarizes the tuition fees and accommodation fees per year for non-local students studying in the Ug programmes in Hong Kong.

In 2004, the government gave a range within which the institution should ask non-local students for tuition per year. It was from HK$60,000 to HK$80,000 per student. Right now HKU and HKUST are charging non-local students around HK$100,000 per year.

3.3 The current situation of higher education provision in Hong Kong

3.3.1   Higher education provision for non-local students by local providers

Hong Kong is trying to export her higher education through inbound provision in the eight UGC-funded institutions. Actually, there are two categories of local higher education providers for inbound consumption. First, the eight UGC-funded institutions as listed above offering SD, Ug, TPg and RPg programmes for local students as well as non-local students.

Second, the non-UGC-funded institutions such as Shue Yan University, Open University, Chu Hoi College, the Hong Kong Academy for Performing Arts, Vocational Training Council, the continuing professional education (CPE) section of the eight UGC-funded institutions and other community colleges offer mainly SD, Ug and TPg on a self-financed basis. Due to resources constraints, representatives of two private institutions expressed that they have no plan to promote higher education overseas but they put their effort in recruiting students from the Chinese Mainland (Appendix B, R6). The number of non-local students they recruited is still very small (Appendix B, R7). There are less than 100 students from the Chinese Mainland to studying associate degrees as the policy focuses on recruiting Ug students (Appendix B, R2). For example, in two private tertiary institutions, there are about eight and 73 students from the Chinese Mainland respectively attending Ug programmes (Appendix B, R6 & R7).

3.3.2   Hong Kong's higher education programmes

3.3.2.1   Category of academic programme and level of study

There are seven categories of academic programmes offered by the UGC-funded higher education providers for local and non-local students, namely "Medicine Dentistry & Health", "Science", "Engineering and Technology", "Business & Management", "Social Sciences", "Arts & Humanities" and "Education". These programmes are delivered at four levels of study, namely SD level, Ug level, TPg level and RPg level.

a.   Sub-degree (SD) level: The CPE section of each university in Hong Kong has offered SD programmes to attract both local and non-local students. However, there is no record of non-local students from the Asian countries enrolled in the SD courses except some from the Chinese Mainland (Appendix B, R8).

b.   Undergraduate (Ug) level: The academic programmes at this level are offered on the UGC subsidized basis but non-local students are enrolled on a slightly self-financed basis simply because their tuition fee is at least HK$15,000 more than that paid by local students per year.

c.   Taught Postgraduate (TPg) level: The academic programmes at this level are mostly offered on a self-financed basis with the exception of some postgraduate diploma in education (PGDE) courses being funded by UGC. Local and non-local students can be enrolled in these types of courses without government subsidization.

d.   Research Postgraduate (RPg) level: The academic programmes at this level are offered on the UGC funded basis. There is no quota restriction on non-local student enrolment at RPg level. Students at this level are usually provided with studentships by the funded HEIs in Hong Kong.

3.3.2.2   UGC-funded programmes attended by non-local students

With reference to the UGC data summarized in Table 3.2 and Figure 3.1, a total of 7,293 full-time and part-time non-local students were enrolled in seven academic programme categories in eight funded HEIs of which 3,979 students were involved at the Ug level of study, 88 at the TPg level and 3,225 at the RPg level as at the academic year of 2007/08.

Non-local students liked to attend business related programmes at the Ug level. For example, out of 3,979 non-local students attending Ug programmes, there were 1,346 students enrolled in the academic category of Business and Management, almost double those enrolled in the category of Science and Social Science.

According to the interviews with stakeholders of the eight UGC-funded institutions and two non UGC-funded higher education providers, the academic programmes of "Business & Management" such as Accounting, Business Administration, Global Business/Finance, Finance and Economics and Marketing at the Ug level were attractive to students from the Asian markets (Appendix B, R9).

However, if we take into account the total number of non-local students enrolled at different levels of study (Figure 3.1), the academic category of Engineering and Technology admitted most students up to 1,872 full-time and part-time non-local students; the second was the category of Sciences where a total of 1,717 students was enrolled, then the category of Business and Management attended by 1,529 students. This was because quite a number of students were enrolled in the RPg programmes in the categories of Sciences, Engineering & Technology, Social Sciences and Arts & Humanities whereas only 183 RPg students were studying in the area of Business and Management.

Over 50% of students studying at RPg levels were non-local students in the HEIs. There was a total of about 5,800 RPg students in Hong Kong among which about 3,200 were non-local students.

Table 3.2 Non-local student enrolment (headcount) of UCG-funded programmes by institution, level of study, broad academic programme category and mode of study, 2007/08

Institutes	Level of study	Medicine Dentistry and Health		Sciences		Engineering & Technology		Business & Management		Social Sciences		Arts & Humanities		Education		Total	
		Full time	Part time	Full time	Part time	Full time	Part time	Full time	Part time	Full time	Part time	Full time	Part time	Full time	Part time	Full Time	Part time
CityU	Ug	—	—	80	—	87	—	214	—	79	—	27	—	—	—	487	—
	TPg	—	—	—	—	—	—	—	—	9	—	—	—	—	—	9	—
	RPg	—	—	108	2	107	8	31	—	43	—	38	2	—	—	326	12
HKBU	Ug	11	—	87	—	—	—	82	—	123	—	31	—	3	—	337	—
	TPg	—	—	—	—	—	—	—	—	—	—	—	—	1	—	1	—
	RPg	8	1	61	1	0	—	10	—	16	—	13	—	2	—	110	2
LU	Ug	—	—	—	—	—	—	73	—	26	—	22	—	—	—	121	—
	RPg	—	—	—	—	—	—	12	—	3	—	5	—	—	—	20	—
CUHK	Ug	4	—	160	—	212	—	282	—	135	—	35	—	—	—	828	—
	TPg	—	—	—	—	3	—	—	—	1	—	—	—	—	—	4	—
	RPg	126	—	265	—	177	1	35	—	142	1	86	—	34	—	865	2
HKIEd	SD	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	Ug	—	—	7	—	—	—	1	—	2	—	105	—	42	—	156	—
	Tg	—	—	4	—	—	—	0	—	1	—	8	—	13	—	26	—
PolyU	SD	—	—	1	—	—	—	—	—	—	—	—	—	—	—	1	—
	Ug	19	—	63	—	212	—	292	—	2	—	22	—	—	—	611	—
	TPg	—	—	—	—	—	1	—	—	—	—	—	—	—	—	—	1
	RPg	24	—	52	—	156	—	42	—	17	—	16	—	—	—	307	—
HK UST	Ug	—	—	153	—	179	—	194	—	26	—	—	—	—	—	551	—
	TPg	—	—	0	—	7	—	—	—	—	—	—	—	—	—	7	—
	RPg	—	—	239	2	308	1	36	—	36	1	21	—	—	—	640	4
HKU	Ug	22	—	187	—	166	—	209	—	275	—	22	—	7	—	888	—
	TPg	—	—	—	—	19	—	—	—	15	1	—	—	4	1	38	2
	RPg	193	1	245	1	227	—	17	—	128	3	60	3	59	—	929	8
Total	SD	—	—	1	—	—	—	—	—	—	—	—	—	—	—	1	—
	Ug	56	—	737	—	856	—	1346	—	668	—	264	—	53	—	3979	—
	TPg	—	—	4	—	29	1	0	—	26	1	8	—	18	1	85	3
	RPg	351	2	969	6	976	10	183	—	384	5	239	5	95	—	3197	28
	Total	**407**	**2**	**1711**	**6**	**1861**	**11**	**1529**	**—**	**1078**	**6**	**510**	**5**	**165**	**1**	**7262**	**31**

Source: The relevant figures are rounded to the nearest whole number. As such figures may not add up to the corresponding totals, and the zero figure represents magnitude of less than 0.5.
The table was retrieved from the UGC website as at 19 May, 2009
http://www.ugc.edu.hk/eng/ugc/publication/report/figure2007/figures/12.pdf

Figure 3.1 Non-local student enrolment (headcount) of UCG-funded programmes by level of study and programme category, 2007/08
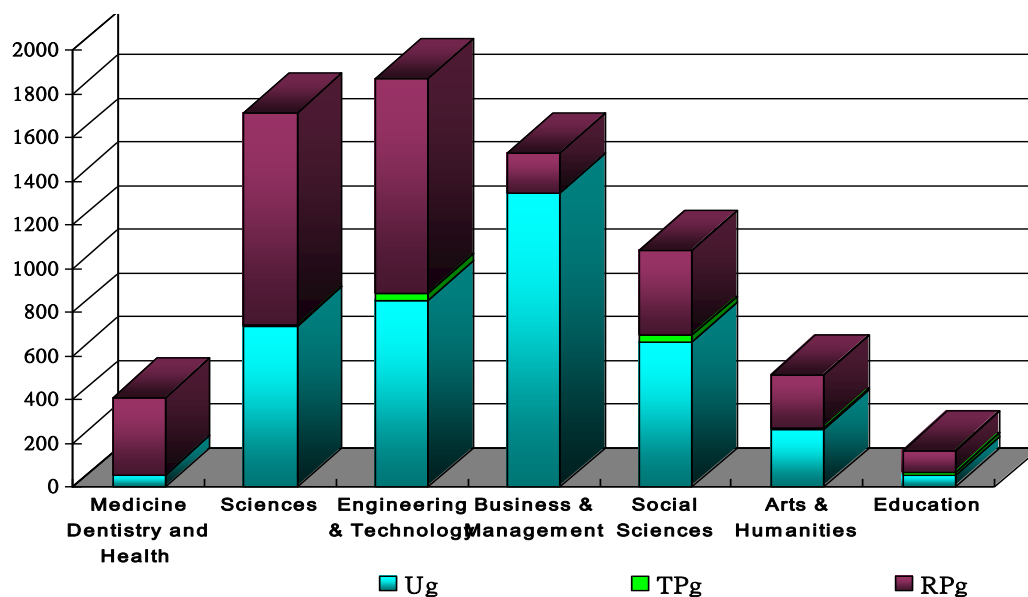
3.3.2.3 Non-UGC funded programmes attended by non-local students

a. There was no quota for recruiting non-local students as long as the TPg programme was run on a self-financed basis (Appendix B, R2).

b. The community colleges and the CPE section of the HEIs in Hong Kong offered different types of non-UGC funded SD programmes but there was no record of students from the Asian countries attending these programmes. The relevant CPE sections of most HEIs have partnered with overseas HEIs to offer self-financed SD, Ug and TPg programmes in Hong Kong, many of which were delivered in part-time modes. Hence a few of the non-local students were enrolled in the full-time mode of the self-financed programmes. The institutions put focus on recruiting local students who have a full-time day job.

c. With reference to the Education Bureau (2007), there are a total of 1,172 non-local courses composed of 426 registered and 746 exempted courses as at 31 December 2007. To safeguard standards and quality, the Registrar of Non-local Higher and Professional Education Courses (NLHPEC) will approve the registration of a course only if it meets the criteria detailed in section 10 of the Non-local Higher and Professional Education (Regulation) Ordinance Cap. 493 (the Ordinance) which has come into effect since June 1997. The exempted courses are conducted in collaboration between a non-local institution and a specified local HEI which could

be one of the UGC funded HEIs, Hong Kong Shue Yan University or the Hong Kong Academy for Performing Arts. These courses have to be accredited by the Hong Kong Council of Academic Accreditation & Vocational Qualifications (HKCAAVQ).

d. Most of the UGC-funded institutions offer non-UGC funded programmes at the TPg level for local and non-local students. Non-local students attending these TPg programmes are mainly from the Chinese Mainland. Only a few come from selected Asian countries. With reference to the responses from seven UGC funded HEIs, four CPE sections and three non-UGC funded HEIs as at January 2008 (Table 3.6), 2,151 non-local students are reported as enrolled in the self-financed TPg programmes in 2007/08 in which the academic categories attended in terms of popularity are: Business and Management, Engineering and Technology, Sciences, Arts and Humanities, Social Sciences and Education. In addition, a total of 75 non-local students were enrolled in the Education programme category of the TPg in three UGC funded HEIs and one CPE section. Replies from the institutions show that at least two UGC-funded HEIs and four CPE sections have received non-local students in the SD programmes and three non-UGC funded HEIs have recruited non-local students in the Ug and TPg programmes on a self-financed basis.

e. Among those self-financed TPg programmes, MBA and EMBA were most attractive. In fact, the MBA programmes in three of the local HEIs could successfully attract students from the Asian countries and even from the rest of the world to come to Hong Kong for their full-time study since their programmes were ranked in the top 50 in the world. The institutions also provided internships and opportunities of international exposure. Though the tuition fee of the MBA programmes was about HK$200,000 to HK$300,000 and EMBA about HK$700,000 per course, it was still cheaper and more competitive than those in the U.S.A. and the U.K. Thousands of applications from all over the world are received each year (Appendix B, R15).

3.3.3   Case studies of non-government subsidized programmes for the Asian countries

3.3.3.1   Case 1 – MBA programme offered in a local HEI

The following descriptive analysis of the case study is based on an in-depth interview with a respondent who was in charge of the programme (Appendix B, R16).

a. **General description of the programme:** The MBA programme offered by this HEI is primarily self-financed. It was named the "Best MBA School in East Asia" by business magazine *Asia Inc* in both 2003 and 2004. There are around 50-60 students in the full-time MBA programme and 60 to 70 students in the part-time programme, of which 80% are local students while the other 20 % are other ethnics who work in Hong Kong. The full-time mode lasts for 14 months and the tuition fee is HK$300,000 per programme. There are 10 Indian students and 17 from the Chinese Mainland in the academic year of 2007/08. The rest of them are from different overseas countries. During the course of study, students can work for 16 hours per-week in the internship related to their majors. The MBA programme has offered to some students with scholarships which are sponsored by companies or who come along with internships in those companies.

b. **Programme characteristics:** The full time programme has been in partnership with London Business School in the U.K. and Columbia Business School in the U.S.A. Students spend 10 months of their study in Hong Kong, and then another three months in either London or New York. After that they come back to Hong Kong and start doing their projects in the Chinese Mainland.

c. **Prospect of graduates:** Many of the graduates have gone back to their own countries and worked on Asia related projects. Some of them have got a job in the Chinese Mainland and Hong Kong. A lot of alumni have gone to work in Singapore.

d. **Marketing ideologies:** The respondent reiterated that the next two decades belong to Asia and the MBA programme should be more international. Anyone who aims at being part of this will consider studying in Hong Kong, Singapore or the Chinese Mainland. He felt that, as the education system of the Chinese Mainland is not as well developed as that in Hong Kong, it would be easy to promote our higher education in the Chinese Mainland. People in the Mainland know where Hong Kong is and they also recognize the language.

As the economy in India and China is growing rapidly, the respondent believed that students in these two countries wishing to study Business and Finance should receive their higher education in an international city which is deeply hooked up with the Chinese Mainland. Hong Kong fits this criterion. Besides, students get international exposure experiences in the MBA programme. The Chinese Mainland is the first potential market and India is the second largest market due to the fact

that the population density is high in these two countries. He believed that students from developing countries work hard and challenge themselves to move upward.

e. **Marketing strategies:** The Marketing Officer of this programme has collected data through survey and from the UGC website in order to look at how other institutions run their MBA programmes. He also compared programme quality between Hong Kong and Singapore which is considered to be our competitor. He has done comprehensive research on the characteristics and affordability of families in different cities of India as India is a huge market for the MBA programmes.

To promote the MBA programmes, he has gone directly to the schools and Universities in India to recruit students. In addition, he has joined MBA fairs and expos in those Asian countries and set up on-line channels for advertising their programmes. He has never employed any agents. He thought that there is no guarantee that the quality of the agent can be controlled.

Moreover, he has also targeted Germany, the U.S.A and Canada. German companies have business with the Chinese Mainland, so the Germans have a strong desire to learn more about business in the Chinese Mainland. Regarding USA and Canada, American Born Chinese and immigrants from Hong Kong to the U.S.A or Canada are likely to have a tendency to do business in Hong Kong and the Chinese Mainland.

3.3.3.2   Case 2 – MBA programme offered in the second HEI

The following descriptive analysis of this case study is based on an in-depth interview with the respondent taking charge of the Department of Marketing and Recruiting in an HEI (Appendix B, R17).

a. **General description of the programme:** Multi-cultural integration is the main emphasis of the MBA programme in this institution; its objective is not money-making but training MBA students. In fact, this self-financed programme is ranked among the top 50 in the world so it is recognized as a world class programme. The MBA programme started in 1966 and the first international student came from the U.S.A in 1978. The first Chinese Mainland student enrolled in 1990. Because of the rapidly growing economy of the Chinese Mainland, many come to Hong Kong to pursue the programme. The tuition fee is about $200,000 per programme lasting for 18 months. It is cheaper than those in the U.K and the U.S.A.

b. **Profile of students:** Currently, there are 50 students in the full-time programme and 100 in the part-time programme. Those who are enrolled in the programme are required to possess at least three years working experience. Previously, there were 2% to 5% non-local students in the full-time programmes. Currently, 7.5% are non-local. In addition to students from Hong Kong and the Chinese Mainland, there are a significant number of students from India, Malaysia, Japan, Korea, Taiwan, the U.S.A, Eastern Europe, Germany, Peru, France, Belgium and Israel in the full-time programme. Students who are enrolled in the part-time programme are mainly working full time in Hong Kong. Around 5% to 10% of the part-time students come from the region of South China and they come for the programme on Saturdays.

c. **Programme characteristics:** The full-time MBA programme has been in partnership with non-local universities in Taiwan, Xian, Beijing and Europe so as to help students obtain management knowledge and skills in the rest of world. Through offering dual-degree programmes, students study in the partnership universities for eight months. Then the students are awarded the degree of MBA by both universities. Students also have to participate in overseas internships in other countries. Therefore, there is quite an amount of international exposure in the programme.

d. **Marketing strategies:** To recruit non-local students, promote the programme, the institution has adopted various strategies. First, they have posted a lot of advertisements in the business zones in Hong Kong. They have also employed e-marketing strategies to draw potential students' attention. As the programme has gained a reputation among students, they rely on alumni in other countries to help with promotion of the programme. For example, a formal seminar or an informal alumni gathering will help encourage potential students to join the programme. Graduates can help build efficient networks when they go back to their own countries.

In addition, they have used some MBA world tours as one of their marketing strategies. They also organize seminars for those working in banks and invite them to join the programmes for personal development. They use similar strategies to recruit students from Singapore, Malaysia, Thailand, North Asia and India. Furthermore some of the Chinese who migrated to North America come back to study in Hong Kong. In order to accommodate the increasing number of non-local students, a hotel complex is to be completed soon for the MBA students.

3.3.3.3   Case 3 – Master Programmes of Business and Finance offered in the third HEI

The following descriptive analysis of this case study is based on an in-depth interview with the respondent taking charge of Postgraduate Studies in a HEI and recent newspaper reports (Appendix B, R18).

The Master programmes of Business and Finance offered by this institution have been welcomed by local and non-local students. The MBA and Executive MBA programmes especially have a good international reputation and have recently been ranked in top positions. The curriculum of the MBA programmes offers a significant proportion of modules relating to "investment and economic growth in China" which helps attract applicants from every corner of the world.

a.   **General description of the programme:**   Though no scholarship is offered in the MBA and EMBA programmes, the reputation gained in terms of programme quality and the international backgrounds of the professors and students involved has attracted a considerable number of international applicants recently.

In September 2007, "*The Economist*", one of the well-regarded magazines published in the U.K., has ranked the MBA programme offered by this institution the "twentieth" among 100 MBA programmes in the world, 17 positions higher than the previous year and the "first" for two consecutive years in the Asia Pacific Region (Ming Pao, 29 Sep. 2007).

The EMBA Programme was ranked nmuber 15 worldwide in 2005 and was the number one independent EMBA programme in the Asia-Pacific from 2003 to 2005, and in Asia from 2001 to 2005 by London-based *Financial Times*. The EMBA programme was granted "The Best EMBA Educational Organization Award" by *Smart Fortune Magazin*e, a leading professional magazine in human resources in the Asia-Pacific region, in 2004. In October 2007, after assessing all the EMBA programmes in terms of graduates' annual income, growth rate of their income, participants' working experiences, programme quality, institutions' quality, international backgrounds of both the professors and students, professors' publications, etc., the "*Financial Times*" ranked the abovementioned EMBA programme "first" in the world, it having been assessed "third" in the previous year (Apple Daily, 23 Oct. 2007).

b. **Programme characteristics:** The MBA programme has been established for 17 years. The tuition fee is HK$255,000 per course lasting for 14 months. Being embedded with overseas exchange activities is the selling point of the programme; 90% of the students have participated in the scheme by going to European and American countries to enrich their learning. According to students from the Chinese Mainland, the internationalization of the studying environment, Hong Kong as an international financial centre and the opportunity to strengthen their international horizons are the three most important factors that attract their enrolment in the programme.

The EMBA programme offered jointly with Kellogg School of Management of the North West University in the U.S.A since 1998 also has a very good reputation in the world. Students have to pay the tuition fee of HK$730,000 for the 16-month programme in which air tickets are included to assist those flying to Hong Kong on weekends for classes. They are also required to attend classes in both Europe and the U.S.A. Applicants wishing to attend the EMBA programme have to have at least 10 years' working experiences with a good command of English. Government officials of Hong Kong, directors of successful public limited companies, key persons of political parties in Hong Kong are invited as guest speakers in the programme.

c. **Profile of students:** Multi-cultural integration is one of the main emphases of the programme since students are of different nationalities. In the academic year of 2007/08, 75 students are enrolled in the MBA programme. There are not only local students, but students from France, the U.S.A., the U.K., Germany, Canada, Switzerland, Italy, Japan, Korea, Australia, the Chinese Mainland, the Middle East, Eastern Europe, etc. The 75 full-time MBA students possess brilliant working backgrounds as most work in well-known multi-national companies and obtained their first degree in the world's leading universities such as Stanford, UC Berkeley, Yale, Toronto University, Peking University, etc. The average annual income of these MBA graduates is around HK$500,000.

The 60 EMBA participants also have international backgrounds coming from 17 nations and regions. Half of them are working outside Hong Kong. Participants in this EMBA programme are senior executives of multi-national companies with an average annual income of about HK$2,460,000. It is reported that there will be an average of 85% growth in their income after graduation. Some are even directors of the public limited companies, chairpersons of non-government organizations and government officials of many countries.

d. **Marketing characteristics:**   More than 200 MBA students from overseas universities who consider China as a good market and Hong Kong as a bridge to China have come to Hong Kong for the exchange programme. These exchange students help disseminate information about Hong Kong's MBA programmes in their own countries. The programmer in-charge highlighted that though there is keen competition in the MBA market in the world, his institution will strengthen the programme by nurturing students with leadership and entrepreneurship in order to meet the needs of the market.

To encourage directors of some voluntary organizations to participate in the EMBA programme, the programmer in-charge highlighted that they have offered them scholarships worth HK$365,000, almost half of the actual tuition fee in the year of 2007/08.

e. **Master of Science in Global Finance Programmes:** According to the programmer-in-charge, encouraged by the successful experiences of offering the two types of MBA programmes mentioned above, the institution, in partnership with the Stern School of Business of the New York University, has offered a joint Master of Science in Global Finance programme in November 2007.

3.3.3.4   Summary of findings of the three cases

To summarize, a total of three distinguished MBA programme HEIs in Hong Kong were studied. Some similarities and differences were observed in terms of the programme in general, programme characteristics, profile of students, and marketing ideologies and strategies. Regarding the MBA programmes offered by these three HEI, they are primarily self-financed and they are recognized as world class MBA and/or EMBA programmes. The full-time mode for an MBA programme lasts for 14-18 months. The tuition fee is about $200,000-$300,000 per programme. The EMBA programme expects students to pay a higher tuition fee (HK$730,000) for the 16-month programme. During the course of study, some HEIs offer their students 16 hours per-week of the internship related to their majors. Some HEIs offer scholarships to some students, whereas, no scholarship is offered in other HEIs. Enrollment in the full-time and part-time MBA programmes in each HEI is relatively small-- about 50-100.

Regarding programme characteristics, the full time programme of these HEIs has been in partnership with outstanding universities in Europe, America, and /or China to obtain international exposure and further management knowledge and skills. Some HEIs even

offer dual-degree programmes and/or joint-degree programmes. Students are required to study in the partnership universities for a period of time.

Regarding the profile of students, the majority of participants are either local or come from the Chinese Mainland. Only a small proportion comes from other overseas countries namely Europe, America, and other parts of Asia. Participants that enroll in these programmes are highly qualified as most of them possess solid work experiences in various well-known multi-national companies and have obtained their first degree in the world's leading universities.

Regarding marketing ideologies and strategies, as the economy in China is growing rapidly, many believe that students wishing to study Business and Finance would be interested in receiving higher education in an international city which is deeply hooked up with the Chinese Mainland. Hong Kong, as a world-renowned financial centre, serves as such a bridge to the Chinese Mainland. In the promotion of the MBA/EMBA programmes, HEIs have adopted different types of strategies to recruit non-local students. Some have gone directly to the schools and universities to recruit students, joined MBA fairs and expos and set up on-line channels for advertising their programmes. Some have employed e-marketing strategies and MBA world tours. Alumni networking has also helped attract potential students to join the programmes. Some have used exchange programmes to disseminate information in the countries of those exchange students. Last but not least, some HEIs have used scholarships as an incentive to attract participants in the EMBA programme, e.g. offering scholarships worth half of the actual tuition fee.

3.4   The profile of students from the Asian countries

3.4.1   Enrolment of non-local students in UGC-funded institutions

As mentioned previously, UGC-funded institutions recruited 7,293 non-local students in part-time and full-time programmes in the academic year 2007/08, of which 3,225 enrolled in RPg programmes, 3,979 in Ug programmes, and 88 in UGC-funded TPg programmes (Table 3.2).

As indicated in Table 3.3 below, non-local students from Asian countries other than those from the Chinese Mainland, total 347. HKU and CUHK have recruited more Asian students than the other local institutions. For HKU, CUHK and HKUST, each has received more than a thousand non-local students. After excluding students of the

RPg programmes, at least five UGC funded institutions have not made full use of the 10% quota for non-local students in their full-time and part-time modes of the Ug and TPg programmes (Appendix B, R3).

Table 3.3 Non-local student enrolment (Headcount) in part-time (PT) and full-time (FT) UGC-funded programmes by institution and place of origin in 2007-2008

Institution	The Chinese Mainland		Other places in Asia		The rest of the world		Total	As % of total student enrolment
	FT	PT	FT	PT	FT	PT		
CityU	781	12	22	–	19	–	834	9%
HKBU	442	1	2	1	4	–	450	8%
LU	125	–	9	–	7	–	141	6%
CUHK	1563	1	107	–	27	1	1699	13%
HKIEd	182	–	–	–	–	–	182	3%
PolyU	859	1	42	–	18	–	920	6%
HKUST	1118	2	49	2	31	–	1202	17%
HKU	1622	2	112	1	81	7	1865	14%
Total	**6732**	**19**	**343**	**4**	**187**	**8**	**7293**	**10%**

Source: Extracted from UGC (2009):
http://www.ugc.edu.hk/eng/ugc/publication/report/figure2007/figures/13.pdf

Table 3.4 demonstrates the percentage of students from "the Chinese Mainland", "other places in Asia" and "the rest of world" in eight UGC-funded institutions in Hong Kong. In fact, 2.6% of non-local students came from the category "the rest of the world". However, non-local students from the category "other places in Asia" occupied only about 5% of the total enrolment. It is pretty clear that the majority of non-local students (92.57%) were those from the Chinese Mainland. (Figure 3.2)

**Table 3.4 Percentage of non-local student enrolment (headcount) of UGC-funded
programmes by institution and place of origin in 2007/08**

Origin / Institutions	The Chinese Mainland % (Number)	Other Places in Asia % (Number)	The rest of the World % (Number)	Total % (Number)
City U	10.87%(793)	0.30%(22)	0.26%(19)	11.44%(834)
HKBU	6.07%(443)	0.04%(3)	0.05%(4)	6.17%(450)
LU	1.71%(125)	0.12%(9)	0.10%(7)	1.93%(141)
CUHK	21.45%(1564)	1.47%(107)	0.38%(28)	23.30%(1699)
HKIEd	2.50%(182)	—	—	2.50%(182)
PolyU	11.79%(860)	0.58%(42)	0.25%(18)	12.61%(920)
HKUST	15.36%(1120)	0.70%(51)	0.43%(31)	16.48%(1202)
HKU	22.82%(1664)	1.55%(113)	1.21%(88)	25.57%(1865)
Total	**92.57%(6751)**	**4.76%(347)**	**2.67%(195)**	**100%(7293)**

Source: The percentages are calculated from the UGC figures for the "Non-local student enrolment
(headcount) of UGC-funded programmes by Institution and Place of Origin 2007/08 as at 18 May 2009

**Figure 3.2 Percentage of non-local student enrolment (headcount) of
UGC-funded programmes by institution and place of origin in 2007/08**

2007/08

4.76% 2.67%

92.57%

■ The Chinese Mainland
■ Other places in Asia
■ The rest of the world
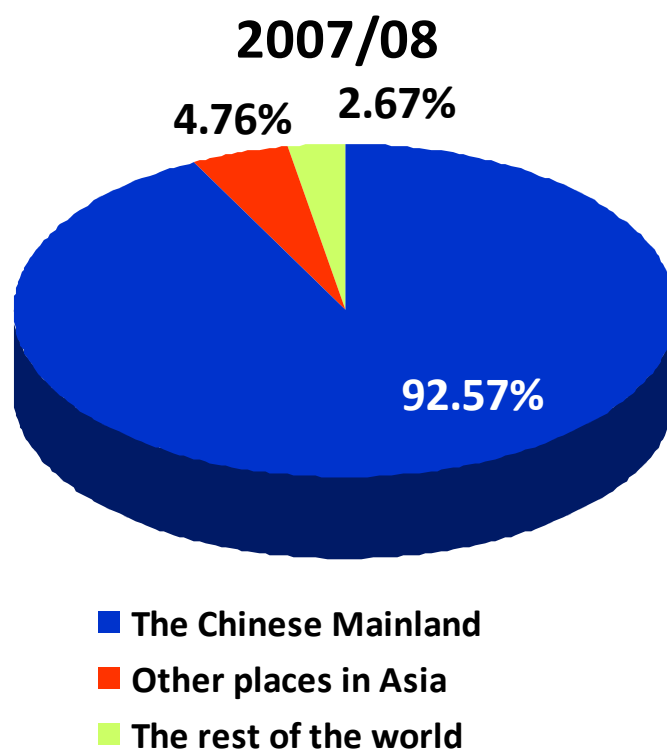
The small number of student enrolments from Asian countries can be further confirmed by figures provided by UGC as at September 2007 (Table 3.5, Figure 3.3). A total of 291 non-local students were enrolled in UGC funded institutions. A significant proportion of Asian students came from Macau, Malaysia and India. The rest included those from the Philippines, Republic of Korea, Sri Lanka, Japan, Thailand and Singapore. According to the Consulate of Indonesia, only a handful of Indonesian students undertook higher education in Hong Kong (Appendix B, R19), so only a few Indonesian students were studying in Ug programmes in Hong Kong.

Table 3.5 Number of non-local Students from "other places in Asia" of UGC-funded programmes in 2005-06 and 2006-07

Place of Origins	2005/06					2006/07				
	SD	Ug	TPg	RPg	Total	SD	Ug	TPg	RPg	Total
India	--	7	3	14	24	--	8	1	14	23
Japan	--		1	6	7	--	1		6	7
Korea, Republic of	--	9	1	4	14	--	12	2	1	15
China (Macao SAR)	--	32	1	5	38	--	57	1	6	64
Malaysia	--	34	2	12	48	--	46	1	12	59
The Philippines	--	2	3	6	11	--	4	2	4	10
Singapore	--	2	2	9	13	--	5	3	6	14
Sri Lanka	--	2		10	12	--	6		11	17
Taiwan	--	3	1	27	31	1	5	1	24	31
Thailand	--	1	1		2	--	3			3
Other Asian countries	--	7	10	27	44	--	13	8	27	48
Total	**--**	**99**	**25**	**120**	**244**	**1**	**160**	**19**	**111**	**291**

Source: Figures provided from UGC as at September 2007

Figure 3.3 Number of non-local students from "Other Places in Asia" of UGC-funded programmes in 2006/07
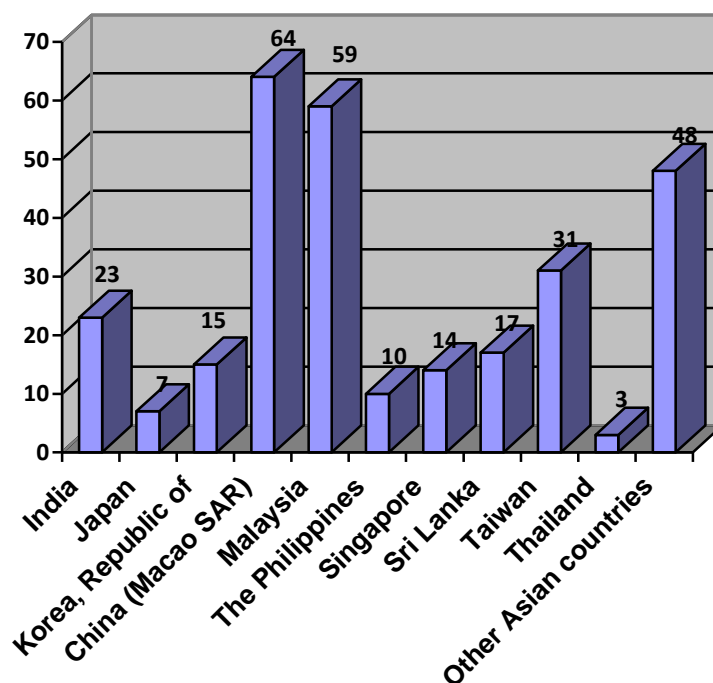
3.4.2   Enrolment of non-local students in self-financed programmes in both UGC funded and non UGC funded institutions.

The figures below (Table 3.6) concerning enrolment of non-local students in self-financed programmes in HEIs in Hong Kong were collected through mailing questionnaires. A total of 20 questionnaires were delivered by post to the Registry of the eight UGC funded HEIs and their CPE sections, and four non-UGC funded HEIs in early January 2008. Eventually, 14 responses were received from seven UGC funded HEIs, four CPE sections and three non-UGC institutions.

Table 3.6 and Figure 3.4 show that a total of 2,811 non-local students attended various programmes at different HEIs on a self-financed basis. 2,615 of them can be classified in terms of places of origin and academic categories enrolled. Majority (83.8%) of them were from the Chinese Mainland, 8.4% from other places in Asia and 7.8% from the rest of the world. (see Figure 3.5) There were 309 and 155 non-local students attending SD and Ug programmes respectively of which only 10 student came from the Asian market other than the Chinese Mainland.

Sixty-four out of 2,615 non-local students were from Malaysia, India and Indonesia.

Almost all of them were enrolled in TPg programmes in which the academic category of Business and Management were most attractive. The majority of students from India were enrolled in the category of Business and Management, probably MBA.

Table 3.6 Total number of non-local student enrolment (headcount) of self-financed programmes by level of study, broad academic programme category (TPg) and place of origin in 2007/08

Place of Origin / Level of Study	The Chinese Mainland	Malaysia	India	Indonesia	Other places in Asia	The rest of the world	Total
Sub-degree (SD)	297	--	--	--	8	4	309
Undergraduate (Ug)	140	--	1	--	9	5	155
Taught Postgraduate (TPg)							
Medicine, Dentistry & Health	20	11	7	--	17	20	75
Sciences	247	--	--	--	2	3	252
Engineering & Technology	436	--	--	1	13	21	471
Business & Management	596	5	31	3	65	84	784
Social Sciences	169	3	1	--	7	33	213
Arts & Humanities	231	1	--	--	12	21	265
Education	43	--	--	--	19	13	75
Others: Textile and clothing	13	--	--	--	3	--	16
Total	**2192**	**20**	**40**	**4**	**155**	**204**	**2615***

Source: Figures provided by the Registries of 7 UGC funded HEIs, 4 CPE sections and 3 non-UGC funded HEIs as at January 2008.
*There were 196 non-local TPg students reported but excluded due to difficulties to classify their places of origin and academic categories enrolled. The total number of enrolled non-local students reported on self-financed basis should be 2811.

Figure 3.4 Total number of non-local student enrolment (headcount) of self-financed programmes in 2007/08 as reported by the registries of UGC funded and non-UGC funded HEIs.
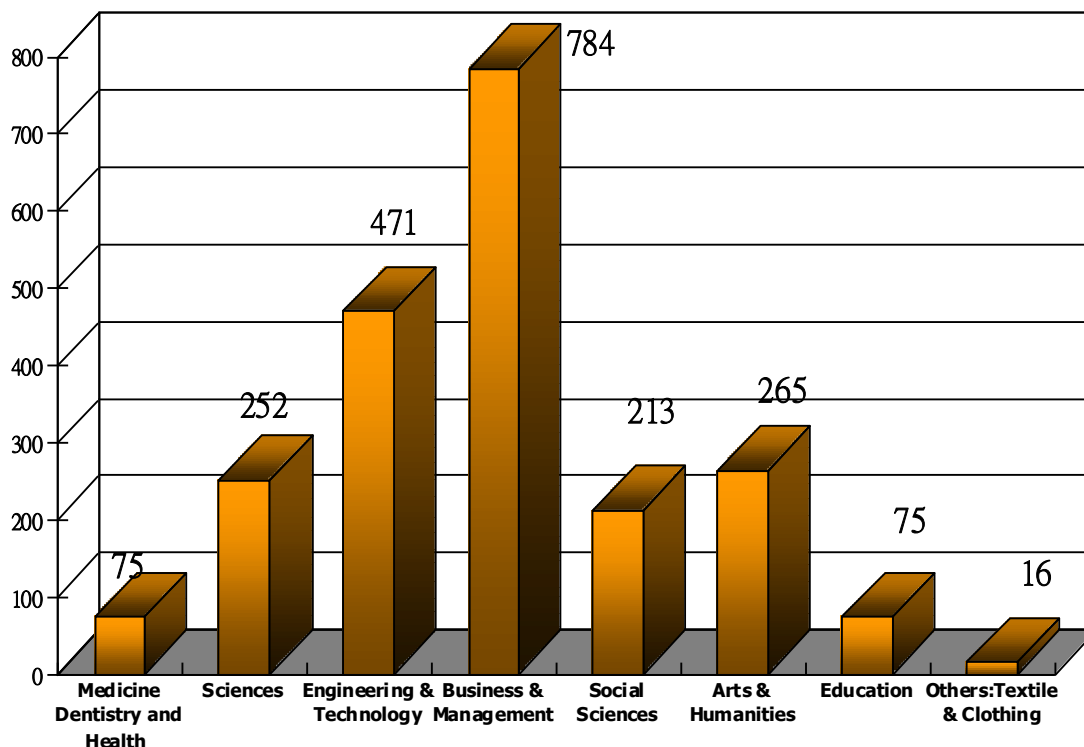
Figure 3.5 Percentage of non-local student enrolment (headcount) of self-financed programmes by place of origin in 2007/08
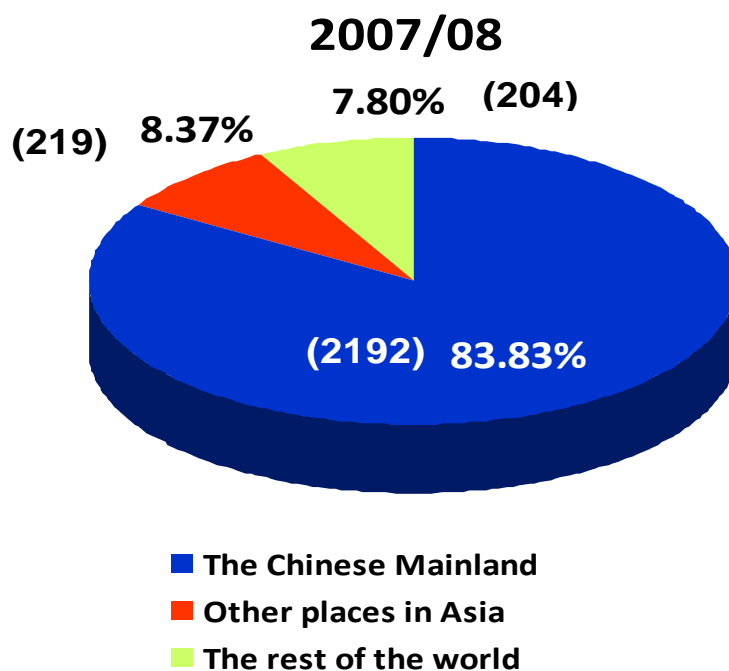
3.4.3   The views of students in three selected Asian countries

This section presents the views of students in three selected Asian countries on (1) visibility of Hong Kong's higher education services and (2) the countries they preferred to study*.

3.4.3.1   Visibility of Hong Kong's higher Education

The findings of overseas survey conducted in the four cities of the three selected countries: Mumbai, New Delhi, Jakarta and Kuala Lumpur confirmed the problem of visibility of Hong Kong higher education in the Asian countries (Figure 3.6 & Table 3.7). Percentages of respondents who reported that Hong Kong's higher education was visible were low: 17% (Kuala Lumpur), 30% (Jakarta), 32% (New Delhi), and 9% (Mumbai).

The five leading sources of non-local students from Asia other than Mainland China in 2006-07 were Macau, Malaysia, Taiwan, India and Sri Lanka. But a high proportion of survey respondents in Kuala Lumpur (83%), Jakarta (70%), New Delhi (68%) and Mumbai (91%) still considered that the promotion activities of HK's higher education were not visible.

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* Note: This part was drawn from the study that contributed to another project commissioned by TDC: *The Report on the Study of Promoting Hong Kong's Higher Education Services to Market outside the Chinese Mainland* (Cheng, et al., 2008).

Figure 3.6 Visibility of Hong Kong higher education
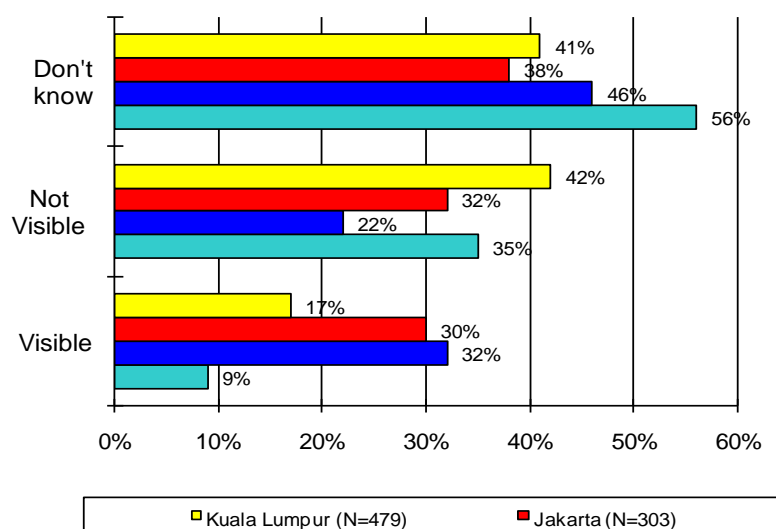
Table 3.7 Visibility of Hong Kong higher education in the four Asian cities

City	Mumbai	Delhi	Jakarta	KL
How much do you know about HK higher education?	Little + Very little: **82.7%**	Little + Very little: **71.7%**	Little + Very little: **75.9%**	Little + Very little: **77.3%**
Overall impression of HK higher education	No idea: **56.7%**	No idea: **40.7%**	No idea: **44.9%**	No idea: **40.4%**
	Good + Very Good: **17.1%**	Good + Very Good: **41.4%**	Good+ Very Good: **34.4%**	Good+ Very Good: **28.8%**
Overall impression of promotional activities of HK higher education in your country	Don't know: **56.1%**	Don't know: **45.5%**	Don't know : **38.1%**	Don't know : **40.8%**
	Not visible**: 34.9%**	Not visible : **22.1%**	Not visible : **32.2%**	Not visible : **42.1%**
	Visible: **9%**	Visible : **32.4%**	Visible : **29.8%**	Visible : **17.2%**

3.4.3.2 Preferred countries

Moreover, our overseas survey also indicated that when compared to other well-established countries exporting higher education such as U.K., U.S.A, Australia and Singapore, Hong Kong's higher education may not be the most preferred choice of the students in three selected Asian countries (Figure 3.7). Take Jakarta as an example, 7 % of the respondents indicated Hong Kong as their preferred country of study, whilst relative figures for Australia, USA, and UK are respectively 23%, 29%, and 22%.

The reasons for them not to choose to study in Hong Kong are given in Figure 3.8. Having no ideas and information about Hong Kong's higher education proved to be the most important factor. The other reasons include "too cost is too expensive", "language is a barrier", and "academic credentials may not be recognized in their country".

Figure 3.7 Countries preferred for higher education
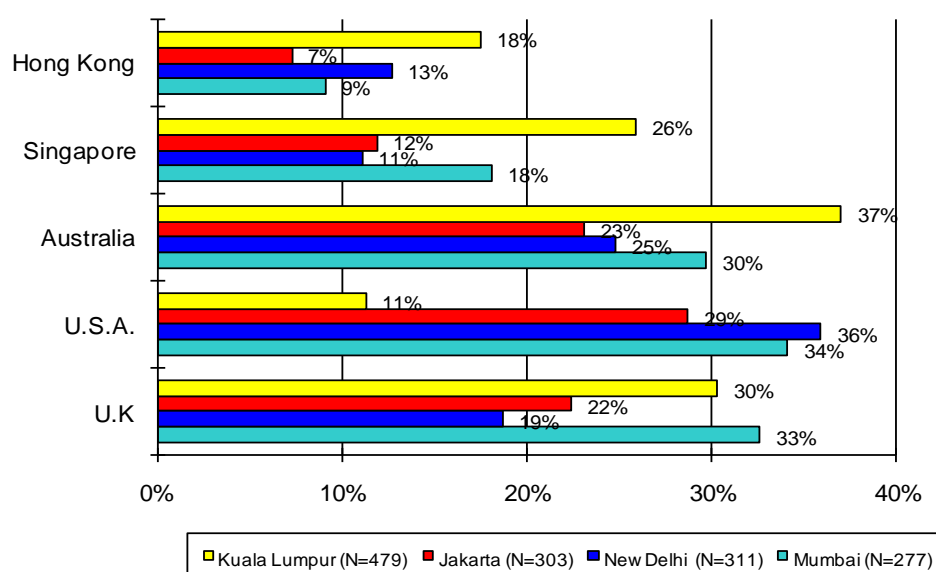
Figure 3.8 Top three reasons for NOT pursuing higher education in Hong Kong

Chart data:

Have no idea or information about higher education in HK: Kuala Lumpur 84%, Jakarta 81%, New Delhi 60%, Mumbai 76%

Total cost is too expensive: Kuala Lumpur 41%, Jakarta 12%, New Delhi 23%

Language is a barrier: Jakarta 29%, New Delhi 21%, Mumbai 19%

Academic credentials may not be recognized in their country: Kuala Lumpur 34%, Mumbai 20%

Legend: Kuala Lumpur (N=479), Jakarta (N=303), New Delhi (N=311), Mumbai (N=277)

3.5   Summary

The sections above describe the current state of exporting Hong Kong's higher education services by examining the policy of inbound provisions for higher education, characteristics of higher education providers and programmes offered for non-local students and the views of non-local students in selected Asian countries solicited by the questionnaire survey. These findings help give a portrait of the current situation of higher education services for non-local students in Hong Kong. They also provide implications for the development of Hong Kong as a regional educational hub. The next chapter will convey the view of stakeholders of HEIs in Hong Kong on the existing promotion strategies, issues, challenges and incentives, as well as their suggestions for promoting Hong Kong as an education hub.

CHAPTER FOUR

CURRENT CONDITIONS OF EXPORTING HIGHER EDUCATION IN HONG KONG

4.1 Introduction

This chapter presents the qualitative findings concerning the conditions of exporting higher education services. They have been collected by interviews, focused group interviews and documentary analysis. The first section reports findings on the existing promotion strategies employed by higher education providers to attract non-local students. The next two sections summarize the respondents' view on the inadequacies and attractions of Hong Kong in relation to exporting higher education services. Then the promotion strategies recommended by the respondents are outlined. The chapter ends by highlighting recent development in policy infrastructure to support the recruitment of non-local students. It is worth mentioning that these findings are primarily based on the views of various individuals and institutions.

4.2 Current promotion strategies employed by higher education providers

Currently, the strategies employed by HEIs to promote higher education services to the international market broadly fall into three categories: (1) programme strategies, which refer to those academic activities and services that integrate an international dimension into their main functions; (2) marketing strategies, which are the promotion and publicity measures used to attract students from the international market; and (3) organizational strategies, which are the structural means used to institutionalize the programme and marketing strategies.

4.2.1   Programme strategies employed by the HEIs

4.2.1.1   Provision of student exchange programmes

Most of the HEIs studied have developed student exchange programmes with overseas universities, which help to promote the image of the institutions. Some overseas students came back for postgraduate courses after experiencing academic exchange in Hong Kong (Appendix C, R1).

4.2.1.2   Scholarship and other forms of financial support

The provision of scholarships is a widely used strategy which succeeds in attracting students from the Asian markets. Studentship or stipend serves a similar role (Appendix C, R2).

4.2.1.3   Establishing high quality higher education services

It has been stressed that the brand name of the programmes and the academic standing of university faculties play a major role to attract overseas students to do postgraduate studies in the institution (Appendix C, R3).

4.2.2   Marketing strategies employed by the HEIs

Publicity strategies to promote higher education in the Asian markets broadly fall into four categories, namely on site visits and expos, multi-media publicity, organization networking and people networking.

4.2.2.1   Education expos and site visits

Individual HEIs join education expos and undertake school visits in the Asian countries.   Information related to higher education programmes, incentives for the studies, learning facilities and environment, application details, etc. are disseminated to target audiences by on site school visits, joining education expos, or selective tours in the Asian countries. China's rising power and the connections of the university with the Chinese Mainland are emphasized to attract students in the Asian countries.   Non-local student representatives' sharing of experiences of studying in Hong Kong in these visits and expos can help promote Hong Kong's higher education to potential students in the Asian countries (Appendix C, R4).

4.2.2.2   Multi-media publicity

A wide range of marketing tools has been used to disseminate information, including sending letters, booklets or advertisements to target schools and institutions, putting up banners in websites; advertising in newspapers and on the web, broadcasting road shows in acclaimed high schools (Appendix C, R5).

4.2.2.3   Organization networking

A couple of HEIs are able to get access to Chinese high schools in the Asian countries through connections with partner organizations such as the United Chinese School Committees Association, also known as Dong Jia Zong, in Malaysia (Appendix C, R6).

4.2.2.4   People networking

Students who have attended exchange student programmes and alumni of the institutions play an important role in promoting the academic programmes. The international students in the campus are also useful resource persons. It has been proved to be very helpful to take Malaysian students currently studying in Hong Kong to the expo as they provide first hand information about Hong Kong and can help potential students understand the situations. Personal connections of university staff have also proved helpful (Appendix C, R7).

4.2.2.5   The first Hong Kong higher education mini-expo

In November 2007, HKTDC organized the first Hong Kong higher education mini-expo in Mumbai and New Delhi, India. At the mini-expo, the HEIs of Hong Kong sent delegates to promote various aspects of their higher education services through exhibitions, talks, and visits to international schools. These promotion activities attracted hundreds of interested students / parents and served the function of "planting seeds" in the Indian community. Newly announced policies related to non-local students' pursuit of higher education in Hong Kong were introduced to students and parents. Organization networking took place with a number of education agencies and a career consultant of a newspaper. The HEI delegates highly appreciated the advantage of running a mini-expo that focused on Hong Kong's higher education over the participation in large-scale expos organized for HEIs by other countries (Appendix C, R8).

4.2.3   Organizational strategies employed by the HEIs

4.2.3.1 Establishing organizational structures to support international education

Some HEIs have established administrative units such as academic exchange offices, international education centres, international recruitment teams, etc. to coordinate efforts in recruiting international students at undergraduate and post-graduate levels. For others, programme promotion is the responsibility of individual academic departments. One of the HEIs has established a Global Lounge to facilitate cultural activities and exchange in the campus (Appendix C, R9).

4.2.3.2 Establishing branches of the institution

At present, the eight UGC-funded HEIs are not keen about establishing branches in the Asian countries, though some of them have established branches in the Chinese Mainland (Appendix C, R10).

4.3   Inadequacies in exporting Hong Kong's higher education services

While HEIs in Hong Kong have undertaken strategies to help export Hong Kong's higher education services, various stakeholder groups expressed the difficulties that they faced. This section outlines the inadequacies that impede the export of Hong Kong's higher education services. These inadequacies are multi-faceted and exist at policy formulation, co-ordination and implementation levels across sectors and within the local higher education sector.   Caution is needed when reading the views expressed by various stakeholder groups reported in this section, as the interviews were conducted from April to December 2007 but the higher education environment in Hong Kong has been changing very fast.

4.3.1   Diverse views towards developing Hong Kong as a regional education hub

4.3.1.1 Diverse views across sectors

The successful development of Hong Kong as a regional education hub relies on a shared vision and concerted efforts among various sectors of society. Hong Kong is at the stage of framing and clarifying the aims of such a pursuit.

A couple of policy-making stakeholders (e.g. senior officers of Immigration Department and the EDB) indicated that the development of Hong Kong as an education hub has far reaching implications and it touches on different areas such as education, immigration, and public finance, etc. (Appendix C, R11). The HUCOM representative considered that the development of Hong Kong as an education hub has to be examined in the context of internationalization of higher education which is multi-faceted and can carry different policy aims, e.g. exporting higher education services for profit-making, attracting talents to Hong Kong, nurturing global citizenship in the globalised world, etc. Different aims match different promotion strategies (Appendix C, R12).

Currently HEIs in Hong Kong focus on the recruitment of non-local students who mainly come from the Chinese Mainland, and lag behind in internationalizing their campuses. HEIs need to explore the development of common overseas markets for Hong Kong's higher education services (Appendix C, R11 & R12).

4.3.1.2   *Diverse views within the local higher education sector*

Some HEI stakeholders expressed the need to develop a shared vision across and within HEIs. There is a dilemma on the one hand that different HEIs need to work together in promoting Hong Kong's higher education to overseas markets while on the other hand they compete with one another on the recruitment of overseas students (Appendix C, R13). Within the organizational environment of an HEI, it is doubtful whether academic staffs at various levels have a shared vision of bringing in overseas students to their institution (Appendix C, R14).

4.3.2   Inadequate visibility of Hong Kong's higher education services in the overseas markets

4.3.2.1   *Visibility problem*

Various stakeholder groups identified the "visibility problem" as the key inadequacy of exporting higher education services. Hong Kong's higher education is not widely known to overseas markets. This is especially true when compared to the reputation of higher education of Australia, the U.K., the U.S.A., Singapore, etc. in the Asian markets (Appendix C, R15).

4.3.2.2   Lack of government-led promotion

A couple of HEI stakeholders stated that there is inadequate government-led promotion for Hong Kong's higher education services to overseas markets. As a result, such promotion work is left to individual HEIs and is currently assisted by the HKTDC (Appendix C, R16).

4.3.2.3   Lack of understanding about specific overseas markets

Overseas markets vary. Some HEI stakeholders expressed concern about their lack of connection with / information about / understanding of different aspects of specific Asian countries, including information about the recognition of qualifications granted by HEIs in Hong Kong. Some HEI stakeholders also showed concern about the inadequate resources for individual HEIs to promote their programmes to the Asian Pacific region (Appendix C, R17).

4.3.3   <u>Inadequate policy infrastructure to support the recruitment of non-local students</u>

4.3.3.1   Limited admission quota for non-local students

Some HEI stakeholders were of the view that HEIs have problems with the limited quota for admission of non-local students. There has been advocacy for an increase in this quota. Yet careful consideration for the implementation details and implications should be made. An increase in admission quota for non-local students, even though the additional student number targets fall outside the UGC-funded places, may lead to possible elevation of the actual admission standards for those highly competitive programmes that are very attractive to both local and non-local students. Whether this possible elevation of actual admission standards will imply greater difficulties for local students to get admitted into these highly competitive programmes is worth paying attention to (Appendix C, R18).

4.3.3.2   Land scarcity and accommodation problem

Various stakeholder groups identified land scarcity and accommodation problems as the most critical areas that must be tackled for the recruitment of non-local students. While inadequacy of hostels and related facilities is viewed as a general problem across HEIs, the accommodation problem is more acute for specific groups of

non-local students, e.g. non-local students of TPg programmes, non-local students with spouse / family, students of sub-degree programmes, and RPg students (Appendix C, R19).

4.3.3.3   Lack of financial support for non-local students

A number of HEI stakeholders and student groups pointed out that there is a lack of scholarship and financial subsidy for overseas students' tuition fees. Financial support such as scholarship is important in the face of the high cost of living in Hong Kong. Specific groups of students, like those from less favourable backgrounds in the Asian countries, students with families, etc. are in need of financial support. Besides, self-financed TPg programmes find it not useful to be promoted to low-income areas of the Asian countries without scholarships (Appendix C, R20).

4.3.3.4   Immigration issues

A number of HEI stakeholders and student groups showed concern over immigration issues like engaging in part-time work, application for work visas after graduation and restrictions of visa issuance for students from certain countries and for non-local students undertaking part-time programmes (Appendix C, R21). The Chief Executive's 2007 Policy Address has announced a number of measures to address some of these issues. We shall examine these measures in Section 4.6 of this chapter.

4.3.4   Concerns within the local higher education sector

4.3.4.1   The "3+3+4" academic structure

Some HEI stakeholders and students anticipated that the launching of four-year university education in the new "3+3+4" academic structure in Hong Kong in coming years may make higher education in Hong Kong more costly and less attractive to students of some Asian countries, such as India and Malaysia which adopt the British education system, compared to our current three-year university education (Appendix C, R22).

4.3.4.2   Constraints in local higher education programmes

A few stakeholders identified some constraints in local higher education programmes that cause difficulties in recruiting overseas students. At the institutional level, one HEI stakeholder mentioned the difficulties in working with other (overseas) universities to offer joint programmes which are attractive to overseas students. Besides, the lack of flexibility in transfer of credits from overseas institutions can hamper the internationalization of certain programmes (Appendix C, R23). As far as funding is concerned, one of the HEI stakeholders pointed out that self-financed programmes are in need of funds to support the recruitment of non-local students (Appendix B, R16).

There are concerns about the curriculum and language use in teaching and learning. An HEI stakeholder mentioned that there are no foundation year programmes to support overseas students (Appendix C, R24). The problem of language use is two-fold. On the one hand, some students from selected Asian countries highlighted the inadequacies of the English-medium teaching and learning environment in Hong Kong. One of the students mentioned the limited choice of modules delivered in English in the HEI. Another student mentioned difficulties in a Cantonese-speaking Practicum environment in a professional preparation programme. Other students reported that they found difficulty with lecturers' spoken English and lecturers using a lot of Chinese in class. The lack of a good environment for communicating with and improving English is another problem (Appendix C, R25).

On the other hand, there are students who find difficulties with the English-medium teaching and learning environment. For example, students from the Chinese Mainland are good at reading and writing English but not proficient at "listening" and "speaking". Undergraduate Indonesian students also find English as a medium of instruction difficult (Appendix C, R26).

4.3.5   Social and cultural concerns

4.3.5.1   Social and cultural adjustment

Various groups of stakeholders referred to problems with non-local students' adjustment to life in Hong Kong. Air pollution and over-crowding were viewed as obstacles in attracting overseas students. Some non-local students found difficulties in adjusting their diet. Some students felt homesick and others found it difficult to

get used to life in Hong Kong (Appendix C, R27).

Some non-local students found the need to adjust their learning habits as the study / learning mode in Hong Kong was different from their place of origin (Appendix C, R28).

Language barriers appear in different forms for different groups of overseas students. On the one hand, some students expressed a wish for living in a better English-speaking environment in the face of fellow local students' inadequate English proficiency and the predominant use of Cantonese in daily life. On the other hand, some Asian students encountered a difficult time coping with the English language in the beginning (Appendix C, R29).

4.3.5.2   Social integration of non-local students

Most interviewed non-local students expressed that they meet nice people, including their fellow local students, in Hong Kong. Yet a few HEI stakeholders and some students indicated problems with social integration between local and non-local students. In general, there was limited interaction between local and non-local students. On the one hand, perceptions like local students not having great interest in interacting with non-local students, local and non-local students being competitors after graduation, Hong Kong not being safe for Muslims, etc. existed (Appendix C, R30). On the other hand, there were perceptions that local students have very different lifestyles and study habits, and are materialistic, luxury-obsessed, immature, and short-sighted, tend to blame others and lack self-reflection. In the worst scenario, discrimination against students from Africa and the Chinese Mainland was felt (Appendix C, R31).

4.4   Factors facilitating the export of Hong Kong's higher education services

We have explored the inadequacies identified by various stakeholder groups that need to be addressed if Hong Kong is to develop itself into an education hub in its recruitment of students in the international market. What follow are various stakeholder groups' views about Hong Kong's attractions that facilitate the export of higher education services to overseas students from the Asian countries. The attractions are two-fold: (1) the attractions of Hong Kong itself; and (2) the attractions of Hong Kong's higher education services.

4.4.1   Attractions of Hong Kong to overseas students

4.4.1.1   International City and Political Stability

Some HEI stakeholders and non-local students stated that being an international city and a regional financial centre, Hong Kong is attractive to overseas students (Appendix C, R32). They believed that the economic environment and better pay in Hong Kong provide them opportunities for future career development (Appendix C, R33). To some non-local students, studying in Hong Kong could serve as a stepping stone for career development and further study in other countries. Besides, getting permanent residency after seven years of stay in Hong Kong was an attraction to some non-local students (Appendix C, R34)

Interviews with non-local students show that Hong Kong being a safe and politically stable city is an important factor for attracting overseas students (Appendix C, R35). Indeed, one of the Indonesian students indicated terrorism in his / her home country discourages him / her to go back after graduation (Appendix C, R36).

4.4.1.2   The Chinese Mainland factor

Hong Kong's geographic proximity to, and business and cultural ties with, the Chinese Mainland are major attractions to overseas students. Various groups of stakeholders saw these as providing a gateway / springboard to business opportunities in the Chinese Mainland. Future career opportunities in business fields in the Chinese Mainland make programmes related to Business and Management attractive to overseas students (Appendix C, R37).

Some stakeholders regarded Hong Kong's proximity to, and cultural ties with, the Chinese Mainland and its being a crossroad of Chinese and Western cultures, as providing a good environment for non-local students to learn Chinese culture in English and learn the Chinese language (Appendix C, R38).

4.4.1.3   Social and cultural attractions

Various types of freedom, e.g. academic liberty, freedom of speech, are seen as an important asset of Hong Kong as a city in China. Efficiency in different walks of life and work ethics are also attractive to non-local students (Appendix C, R39).

A couple of HEI stakeholders and non-local students from selected Asian countries found that English-speaking in education and business as well as daily life constitutes a facilitating condition for overseas students to live in and communicate with people in Hong Kong (Appendix C, R40).

A couple of HEI stakeholders and non-local students from selected Asian countries stated that different aspects of daily life, like people, food & living environment, are fine (Appendix C, R41). Proximity of Hong Kong to other Asian countries, family and social connections with Hong Kong facilitates students from these countries to pursue higher education in Hong Kong (Appendix C, R42).

4.4.2   Hong Kong's higher education services

4.4.2.1   Quality of Hong Kong's higher education

Some HEI stakeholders and overseas students indicated that the high quality and good reputation of Hong Kong's education attract overseas students. The quality of Hong Kong's higher education is reflected in the international ranking and reputation of individual HEIs, individual programmes, individual research areas, and individual academic staff, as well as good facilities and study environment. The international networks of certain programmes and academic staff, as well as incorporating Chinese elements into study programmes are also seen as advantages of higher education in Hong Kong. Scholarships for top students are attractions to non-local students (Appendix C, R43).

The quality assurance measures and mechanisms in the Hong Kong higher education sector, at the institutional and system levels, form an important basis of the credibility of quality higher education services. Various bodies are responsible for the quality assurance of different types of higher education programmes in Hong Kong.

The high quality of Hong Kong's higher education is built on the UGC's commitment to safeguarding and promoting the quality of UGC-funded institutions and their activities up to international standard. International benchmarking in research performance of UGC-funded institutions has been in place. Besides, the UGC has performed the quality assurance role through conducting the Management Review (1998-1999), Teaching and Learning Quality Process Reviews (1995-1997 and 2001-2003), and the Performance and Role-related Funding Scheme (2004).

These reviews / schemes have served to ensure effective quality assurance (hereafter, QA) mechanisms in place in each UGC-funded institution. In April 2007, the UGC set up the Quality Assurance Council (hereafter, QAC) under its aegis to assist it in its QA responsibilities, including the QA of publicly-funded programmes at various levels of study and self-financed programmes at undergraduate and post-graduate levels.

The Hong Kong Council for Accreditation of Academic and Vocational Qualifications (hereafter, HKCAAVQ) has been responsible for accrediting non-university tertiary institutions and the programmes of study run by them at degree and sub-degree levels. As more and more non-local students have come to Hong Kong for the study of Associate Degrees, there is a need to uphold the standard and quality of these courses. In addition to the work of assessment for accreditation contributed by the HKCAAVQ, the Joint Quality Review Committee Limited (hereafter, JQRC), an independent quality assurance organization, was established in August 2005 by the HUCOM of Hong Kong constituted by the eight institutions under the aegis of the UGC. The major objectives of the JQRC are to provide for and implement a framework for peer review capable of assuring the quality of self-financing, sub-degree programmes of the continuing education sections and other departments or colleges of the members.

The Registrar of Non-local Higher and Professional Education Courses (hereafter, NLHPEC) and the HKCAAVQ have worked together for the QA of those non-local courses offered by non-local HEIs leading to the award of non-local higher academic qualifications (i.e. sub-degree, degree, postgraduate or other post-secondary qualifications) or professional qualifications.

4.4.2.2   English medium teaching

Though some non-local students found that English speaking is a communication barrier on occasions as described in the previous section, on the whole, English medium teaching is seen as a favourable condition for opening up higher education to overseas students as expressed by many students being interviewed (Appendix C, R44).

4.4.2.3   International exposure

Some non-local students from selected Asian markets regarded opportunities of international exposure as invaluable advantages of studying in Hong Kong HEIs. These opportunities include joining overseas exchange programmes, having workplace learning in overseas internship, attending international conferences (including conferences in the Chinese Mainland), and interacting with an international student body (including overseas students from student exchange programmes), etc. Apart from being a benefit to non-local students, the presence of international students benefits local students in learning and in cross-cultural experience (Appendix C, R45).

4.4.2.4   Tuition fee lower than that of the Western counterpart

Some non-local students from selected Asian countries pointed out that the tuition fee of higher education in Hong Kong is lower than that in the Western countries. Besides, financial support in the form of scholarships, studentships, etc. also attracts them to pursue studies in Hong Kong (Appendix C, R46).

4.4.2.5   Support services offered by the HEIs

One of the HEI stakeholders and some non-local students from selected Asian countries mentioned that the provision of counseling services, Cantonese and English classes, and activities that offer social support can facilitate overseas students' lives in Hong Kong (Appendix C, R47).

4.5   Strategies recommended by various stakeholder groups for promoting Hong Kong's higher education services in the Asian countries

Having acknowledged the inadequacies and incentives involved in exporting Hong Kong's higher education services, the stakeholder groups recommended a number of strategies for promoting Hong Kong's higher education services in the Asian countries. These recommended strategies fall into two broad types: (1) strengthening the government's leading and coordinating roles in developing Hong Kong as a regional education hub; and (2) furthering the programme, marketing and organizational strategies undertaken by HEIs in exporting their higher education services.

4.5.1   The government's role in developing Hong Kong as a regional education hub

4.5.1.1   Leading and managing the development of Hong Kong as a regional hub

The government is expected to play an active and leading role in the promotion of higher education in the Asian countries, including clarification of the objectives of developing Hong Kong as an education hub, identification of the Asian markets, provision of resources, establishment of necessary infrastructure and marketing thrust (Appendix C, R48).

a. **Clarification of the aims of developing Hong Kong as an education hub:** The government is expected to clarify the aims of developing Hong Kong as an education hub. Specific objectives, for example aiming at promoting internationalization or making profit from exporting education, will entail different strategies (Appendix B, R10). It is also recommended to relax the quota for the international students in HEIs (Appendix C, R49) and to expand the scope to other sectors of education; say, to include internationalization of secondary school education.

b. **Establishing promotion infrastructure in the public sector:** Some higher education representatives considered that the best strategy in promoting Hong Kong as an education hub is to continuously enhance the academic excellence and visibility of the higher education sector as students and academics from other parts of the world will be attracted to institutions which are competitive in the international arena (Appendix C, R50).

It was suggested that an organization like the British Council in the U.K. should be set up to promote the internationalization of Hong Kong education (Appendix B, R10). Some HEI stakeholders concurred with this view, yet cautioned that it would not be appropriate for the UGC, which is involved in funding in the higher education sector, to take up this role (Appendix C, R51).

Indeed, there is a common view that government should set up offshore offices in the Asian countries to promote higher education. Hong Kong universities can set up enquiry desk in these offices (Appendix C, R52). The EDB representative suggested that a formal link with relevant organizations such as Overseas Economic and Trade Offices can be established at the government level (Appendix B, R2).

c. **Communication with the governments of the Asian countries: T**he Hong Kong government is suggested to initiate communication and cooperation with the governments in the Asian countries. Recognition of qualifications has to be sought at the government level between Hong Kong and selected Asian countries. The Hong Kong government needs to develop links for market research between countries and initiate country analysis (Appendix C, R53).

d. **Review of immigration / labour policy:** The government is expected to clarify its immigration policy (Appendix C, R14). If Hong Kong is meant to build up an international environment, then the government should allow students from the restricted countries to study in Hong Kong. The visa policy, the labour policy, etc. should be reviewed (Appendix B, R10). Indeed, many students expressed the need for taking up part-time jobs to lessen their financial burden for the tuition fees and living expenses (Appendix C, R54). The government should be more generous in giving work visas so as to attract talent to work in Hong Kong after graduation. Likewise, some students from the Asian countries said that it would be helpful if there was assistance, including the provision of a grace period for job search, for graduates to get a job after graduating in Hong Kong (Appendix C, R55).

e. **Accommodation and land use policy:** Land is scarce in Hong Kong. HEI stakeholders expressed a desperate need for the government to solve the problem of accommodating non-local students. Some of them suggested that the government should build a university dormitory city for students of all the universities in Hong Kong. This would not only solve the problem of hostel shortage but also facilitate cultural exchange among local and non-local students. Other suggestions include investing more money for hostel building in universities, distributing land to the universities to build their own hostels, or subsidizing the students to rent a room outside the campus (Appendix C, R56).

f. **Private university policy:** The government is suggested to develop a clear private university policy to encourage the establishment of a strong private sector of universities in Hong Kong which recruits international students (Appendix C, R14).

g. **Incentives for the HEIs:** Each one of the universities in Hong Kong has its significant roles and the government or UGC needs to promote the specialty of every university and extend the scope of its development. It should provide more

incentives and resources to encourage academic departments and their staff to develop suitable programmes to attract overseas students. The universities should be given enough support and facilities in the campus for the international students. More financial support is also needed for promoting higher education outside Hong Kong if we want not only a regional but also a global education hub (Appendix C, R57).

h. **Central scholarship:** Currently the government does not provide central scholarships although the EDB representative pointed out that part of the 200 million dollar matching fund granted to institutes in 2006 could be used as scholarships. Many HEIs emphasized that more scholarships for international students would secure more overseas students. They stressed that the establishment of a central scholarship would have a greater impact than scholarships offered by individual universities (Appendix C, R58).

i. **Driving marketing strategies from different dimensions:** The government should take the lead to drive marketing strategies in different directions. Firstly, Hong Kong as a financial city with a world class economy that helps improve life should be promoted. Hong Kong as a city with an international image should be promoted in the Asian countries. Secondly, the image of Hong Kong as an education hub has to be promoted in the Asian countries because Hong Kong has only been well-known to them as a tourist centre. Thirdly, the academic excellence of Hong Kong's HEIs has to be promoted in the Asia countries as there is little information about the high standard of higher education in Hong Kong known in the Region (Appendix C, R59).

4.5.1.2   Coordinating various stakeholders and bringing synergy of concerted efforts

a. **Coordinating the efforts of the HEIs:** A number of HEI stakeholders thought the government should provide a platform for the local institutions to exchange views concerning the internationalization of higher education with the government. Some HEIs believed that a more visible image could be created in promoting higher education in the Asian countries if the Hong Kong government could take the lead to coordinate systematic joint universities promotion at the right time. Overlapping efforts could be minimized and more effective use of resources would result (Appendix C, R60).

b. Strengthening the role of HKTDC: HKTDC could be developed as an agent to promote the education of Hong Kong as they already have offices, networks and connections in the world (Appendix B, R10). Continuous support from HKTDC was considered to be very important. HKTDC could provide promotional support and advice to the universities in Hong Kong. Some HEI stakeholders suggested that HKTDC should participate in key education expos in other countries in collaboration with the eight universities. It was also suggested that HKTDC office could connect with schools and universities in the Asian countries to publicize Hong Kong as an education hub (Appendix C, R61).

With regard to the role of HKTDC, it was considered that expertise in trade promotion overseas is a valuable asset to assist the higher education sector in promotion activities for exporting its service (Appendix C, R8). Currently, the HKTDC has a representative sitting in the HUCOM Standing Committee on Internationalization (Appendix C, R62).

4.5.2 Strategies to be strengthened by higher education service providers

*4.5.2.1 Programme strategie**s***

a. Continuous enhancement of academic excellence and visibility of Hong Kong's higher education: The best strategy for promoting Hong Kong as an education hub is to continuously enhance the academic excellence and visibility of the higher education sector as students and academics from other parts of the world are attracted to institutions which are competitive in the international arena (Appendix C, R50).

b. Development of a variety of customized academic programmes: More various and customized academic programmes should be developed. Suggestions included Business programmes plus Chinese study; dual-degree programmes jointly offered by two universities; exchange student programmes; university faculty exchange programmes; sandwich programmes, programmes including components of Putonghua learning; part-time programmes targeting the South East Asia market; collaboration with companies to offer student internship opportunities; providing foundation courses to help bridge Secondary 5 graduates to undergraduate studies (Appendix C, R63).

c. **Provision of scholarships and financial assistance:** All inbound students from the Asian countries stressed that attractive scholarships or financial assistance is of vital importance for them to come to study in Hong Kong. It was suggested that banks in Hong Kong should tie up with the universities in Hong Kong and provide loans to non-local students (Appendix C, R64).

4.5.2.2   Marketing strategies

a. **Joint efforts of the HEIs:** HEI stakeholders and students from the Asian countries suggested that the eight UGC funded HEIs should pull resources together to have some joint promotion activities through various means such as a mini expo, massive exhibition, talks in schools, advertising on TV and internet (Appendix C, R65).

b. **Establishing clear Asian markets:** It is important for the HEIs to have clear targets for promotion. HEI stakeholders and students from selected Asian countries made some recommendations. In Indonesia, Indonesian Chinese in Meden and Subiyar; government officials' children; students in Christian, Catholic and international schools; and students in Christian universities were suggested as promising targets. In Malaysia, Sabah should be explored as there would be keen competition with the Chinese Mainland and Taiwan if Hong Kong HEIs target Kuala Lumpur. Apart from Kuala Lumpur, Penang and Joho are potential markets in Malaysia. In India, New Delhi, Mumbai, Bangalore, Chennai, Hyderabad, Kolkata, Ahmedabad could be potential markets. Apart from geographical consideration, HEIs need to get hold of information about at what time(s) of the year overseas students at individual Asian countries make critical decisions for further study at different levels, namely SD, Ug, TPg and RPg levels. Such information is important to the scheduling of promotional activities. (Appendix C, R66).

c. **Critical information dissemination:** Some critical information, which has emerged as part of the unique attraction of studying in Hong Kong, has to become more visible to potential service users. This includes the opportunity for graduates to work in Hong Kong and the benefit of Hong Kong's ties with the Chinese Mainland to their future career development. The good learning facilities and rich learning experiences in Hong Kong should also be clearly conveyed. It is also important to facilitate potential non-local students to develop realistic expectations about studying in Hong Kong (Appendix C, R67).

d. **Networking with organizations:** Students from Malaysia recommended that Dong Jia Zong, which has connection with Independent High Schools and universities for the Chinese communities, should be enlisted. Building networks with schools in the target cities would also be helpful (Appendix C, R68).

e. **People networking:** It is useful for students to meet academics in the expos. It was suggested that academics should go to conferences in the regions. Other possibilities include arranging student tours to Hong Kong, and seeking help of non-local students who attend exchange programmes in Hong Kong to disseminate information about higher education in Hong Kong in their home countries (Appendix C, R69).

4.5.2.3 Organizational strategies

a. **Provision of support services to facilitate non-local students' cultural adjustment and social integration:** Some HEI stakeholders suggested that the university should organize more activities for overseas students to enable them to mingle one with another. More activities and social gatherings conducted in English should be organized to foster a friendly environment for international students (Appendix C, R70).

b. **Provision of support services to non-local students on visa application, career counseling:** Supporting services such as placement, facilitating career-path planning and assistance in student visa application were considered to be very useful to attract students to Hong Kong (Appendix C, R71).

4.6 Recent development in policy infrastructure to support the recruitment of non-local students: The 2007 Policy Address

The Chief Executive's 2007 Policy Address, promulgated on 10 October 2007, has been an important step to address some of the issues related to exporting Hong Kong's higher education services. A number of measures have been recently introduced to facilitate the attraction and retention of non-local students with a view to further developing Hong Kong as a regional education hub. Apart from promoting the development of private universities in the long run, the following measures have been undertaken.

4.6.1   Increasing admission quota for non-local students

Starting from 2008-09 academic year, the non-local student quota for publicly-funded programmes at SD, Ug, and TPg levels will be increased from 10% to 20%. The additional 10% of non-local students are on top of the approved student number targets. There is also relaxation of the restrictions regarding the recruitment of non-local students for self-financed programmes at the SD and Ug levels, and short-term studies at HEIs (excluding the CPE arms).

4.6.2   Establishing a fund to provide government scholarships and student hostel provision

Parallel to the increase in admission quotas, the government will establish an endowment fund of $1 billion to provide government scholarships to local and non-local students, and to explore the feasibility of constructing "joint hostels" to address the student accommodation problem.

4.6.3   Relaxing immigration restrictions

Immigration restrictions regarding employment-related initiatives as well as stay and work after graduation will be relaxed. Non-local students will be allowed to take up study-related internships arranged by HEIs. They will also be allowed to take up part-time on-campus jobs for up to 20 hours per week and off-campus summer jobs during the summer months. The immigration control related to non-local students' stay and work after graduation is also relaxed. Their applications for visa / entry permit will be favourably considered so long as the job concerned is at a level commonly taken up by degree holders and the remuneration package is set at the market level. They may be granted a 12- month stay on time limitation without any condition.

4.6.4   Establishment of a Research Endowment Fund

The Financial Secretary announced the creation of an additional 800 research postgraduate places and the establishment of an $18 billion Research Endowment Fund (REF) to support research and research student training at the UGC institutions. The $18 billion new REF and its investment income will replace the current recurrent grant for earmarked research, and fund appropriate research projects on specific themes.

4.6.5   Possible implications

At the time of writing this report, the aforementioned measures are in the process of being operationalized. While it is envisaged that they would partially help to address some of the inadequacies in exporting Hong Kong's higher education, it is important to inquire further into the implications of these measures for the local higher education sector and other sectors of the local society.

4.7   Summary

This chapter presented (1) the various stakeholder groups' views towards inadequacies in and factors facilitating the export of Hong Kong's higher education; (2) strategies recommended by various stakeholder groups for promoting Hong Kong's higher education services in the Asian countries; and (3) the recent development in policy infrastructure to support the recruitment of non-local students.

The findings presented in this chapter inform our understanding of the strengths and weaknesses of the export of Hong Kong's higher education. At the system level, favourable factors include the attractions of Hong Kong as an international world-class city, its close ties with the Chinese Mainland, its unique position where the East meets the West, and its global trade networking. At the institutional level, the high quality of higher education services is regarded as a major attraction to potential students in the Asian countries.

Despite these strengths, Hong Kong has yet to overcome many challenges in exporting higher education services. Unfavourable factors at the system level include diverse views towards developing Hong Kong as an education hub, inadequate visibility of higher education services in the Asian countries, inadequate policy infrastructure to support the recruitment of non-local students, as well as social and cultural barriers. The medium of instruction (MOI) issue constitutes the major challenge at the institutional level. These favourable and unfavourable aspects, together with the strategies recommended by local stakeholder groups for promoting Hong Kong's higher education services and the recent policy development reported in this chapter form an important basis for consideration of recommendations in the next chapter.

CHAPTER FIVE

RECOMMENDATIONS AT THE SYSTEM LEVEL

The development of Hong Kong as an education hub of the region is a complex issue related to the internationalization of higher education and its impact goes beyond higher education to society as a whole. With reference to the findings presented in the previous chapters, this chapter discusses the issues and implications at the system level. These fall into three policy areas impacting on different sectors of society: (1) the strategic issues and structural arrangements; (2) the higher education policy; and (3) support from other sectors of society.

5.1 Strategic issues and structural arrangements

The complexities of the internationalization of higher education lie in its various underpinning rationales, strategies, benefits and risks to HEIs and the wider society of Hong Kong. The high-level inter-bureau Steering Committee chaired by the Chief Secretary for Administration has been operational since 2006 to examine strategic issues related to the development of Hong Kong as an education hub.

5.1.1 Strategic issues

The current moment is critical for Hong Kong to position herself as a key presence in the world map of higher education in face of the rising global demand for international education and the keen competition with other higher education exporting countries. Taking together the recent policy development (Chapter 4), the strategies recommended by various stakeholder groups (Chapter 4) and information about policies and practices of other higher education exporting countries (Chapter 1), the project team recommends the Steering Committee be more proactive in the following strategic issues:

  a. Clarifying the aims of the development of Hong Kong as the regional hub of education;
  b. Leading policy formulation in the internationalization of higher education and linking this policy to land policy, immigration, economic development, trade plans and other relevant social policies;
  c. Co-ordinating various sectors of the territory to support the development of Hong Kong as an education hub, including the higher education sector,

government and non-government executive bodies, other relevant industry and service sectors, etc.;

d. Entering into policy dialogues and international agreements related to higher education policy, for example in the form of a Memorandum of Understanding, at the Government-to-Government (G-to-G) level, etc.; and

e. Monitoring and evaluating the progress of various facets of the development of Hong Kong as an education hub, and the community reaction to it.

5.1.2   Structural arrangements

It is recommended that the Inter-bureau Steering Committee acting as a leading and co-ordinating body meet regularly to oversee coherence in the complex formulation and implementation of various policies and measures.   The provision of additional resources is essential to enable the different government and non-government executive bodies to undertake corresponding measures recommended in this chapter.

Under current arrangements, it is recommended that the promotion of Hong Kong's higher education services to non-local stakeholders can be enhanced by the concerted efforts of the EDB, HUCOM, HEIs, and HKTDC.

5.1.2 .1   Establishing a designated agency

In the long run, the Steering Committee can also take the lead to consider the desirability and the possible time frame of setting up a designated agency which co-ordinates the implementation of policies and measures related to the development of Hong Kong as an education hub with focus on promoting Hong Kong's higher education services to non-local markets. One of the possible options is to form a designated agency like British Council, Australian Education International and Singapore Tourism Board with a formal and central role to facilitate the goal of exporting Hong Kong higher education. This agency can be supported by all the interested parties including the HKTDC, Hong Kong Tourism Board, Hong Kong HEIs, the EDB and the industry. This will be a crucial step to establish and promote Hong Kong as a regional education hub. The major responsibilities of this agency are as follows:

a. **Undertaking generic promotion abroad:** One of the major responsibilities of the designated agency is to undertake generic promotion abroad on behalf of the Hong Kong HEIs and training industry to carry out the following activities:

- Promoting and marketing Hong Kong Education overseas,

- Developing the education export market as a leading services sector,

- Promoting Hong Kong education and training services in partnership with the industry,

- Coordinating promotion of the industry with broader international education activities and government-to-government education programs,

- Developing a coordinated approach to promote higher education at both the government and national levels,

- Aiding more quality educational institutions in Hong Kong to develop their business and set up campuses overseas, and

- Attracting more internationally renowned educational institutions to set up campuses in Hong Kong.

b. **Collaborating with other institutions and organizations:** The designated agency can serve as an agent in collaboration with UGC-funded HEIs to provide services for international students, ranging from orientation programmes for new non-local students to help them assimilate into the new environment and to education counseling services for students who would like to learn more about available courses in Hong Kong. There is also a facility for student feedback that would serve to enhance the educational experience for the international student community. It can also provide a walk-in facility for non-local students looking for the services mentioned above.

The designated agency can also team up with the international organizations such as the Overseas Students' Association to provide student members with opportunities to develop and foster intellectual, cultural, social athletic and recreational interests and skills. Main duties include providing education counseling services; orientation programmes for international students and collecting student feedback.

Alumni associations are important tool in this exportation of higher education exercise as people networking and word of mouth are important channels of information dissemination reported by the respondents in the target market. Therefore, the designated agency may examine how it can gain most values from further fostering alumni relations in the context of Hong Kong.

In addition, the agency can collaborate with local educational consultants and

agents. According to the studies of the target markets, local educational consultants or agents are acknowledged as the key partners in promoting international education. The designated agency may consider providing training and qualifying programmes for agents and, where possible and appropriate, extend training opportunities to other target markets.

c. **Establishing a quality database:** The designated agency can establish a free up-to-date and user-friendly quality database of Hong Kong education information for the general public in the target markets. The key target audiences will include educational stakeholders such as prospective non-local students, parents, representatives from the industry and other interested individuals and organizations. The database can be advertised by an English-Chinese bilingual website of the designated agency on Hong Kong education with links of individual UGC-funded HEIs, the EDB and other agents/partners in Hong Kong.

The website can help disseminate detailed information on issues and concerns about studying in Hong Kong including niche and uniqueness of Hong Kong higher education, introduction to the education system as a whole with general admission requirements, scholarships, assistantships, job opportunities, diet and leisure etc. It is important to highlight the curriculum and instruction features of all UGC-funded and non-UGC-funded programmes and contact details and websites of individual institutions in Hong Kong. Lastly, the website can be served as a platform for information exchange and advertising programmes via broadcasting in television and radio channels especially in the target markets.

d. **Engaging in research and strategic development:** In line with the call and commitment to make Hong Kong as an emerging destination for internationalization of higher education, the designated agency can collaborate with representatives from all HEIs to conduct market research. The research can be on understanding the fast changing push-pull factors affecting the student choice of countries for overseas study especially in the target markets. For example, possible relating topics include the changing demographics and programme profiles of the target markets. Besides, needs analysis studies may also be conducted with reference to the international and domestic environments in these markets. Research projects can aim at articulating the objectives of generic promotion of Hong Kong as a society choice for study and addressing the issues of concern to the broader industry and community.

Additionally, the designated agency can continue to engage in research and strategic development. To make Hong Kong education brand marketable and competitive, a multi-year strategic plan proposed highlighting the various aspects of Hong Kong's comparative advantages in international education services is critical. The plan can study and recommend strategies by which Hong Kong positions itself in the medium term, the appropriate types of assistance for providers and sectors, and reflect available resources.

The designated agency can also engage in developing education industry especially in the areas of brand and communications positioning, global trend and competitive analysis, upgrading industry capabilities and crisis management. Examples are advertising and publicizing Hong Kong education brand, establishing multi-links with higher education institutions in overseas. The designated agency can also provide more commercial services of direct benefits to individual providers where these service types are consistent with its objectives and missions, subject to the resolution of funding issues.

e. **Developing a formal performance management framework:** Finally, to help the designated agency to better articulate its objectives, it can develop a formal performance management framework endorsed by the Government to provide a basis for a stronger transparent partnership with the industry. This framework can involve developing suitable high level stretching outcomes as well as intermediate objectives in promoting and marketing Hong Kong higher education overseas.

5.2 Higher education policy

It is important to keep in mind that, although policies and practices of other exporting countries (Chapter 1) provide further insights for higher education policy, the recommendations for the higher education sector in this section have to be considered in the context of the changing academic structure in Hong Kong, The government has to ensure that the various higher education policy units / committees in the EDB, the HUCOM, the UGC (including the "3+3+4 Group" formed in January 2008) are mutually informed about each others' work. Besides, it is necessary for the government to ensure coherence between the development of Hong Kong as an education hub and the transition of higher education to the "3+3+4" academic structure.

5.2.1   Enhancing the international competitiveness of Hong Kong's higher
        education

To be a regional education hub, the higher education sector needs to build on its existing high quality and good reputation, strive for sustainable improvement, and ensure that the higher education service is internationally competitive especially when compared to the higher education services of other exporting countries. As shown in Chapter 1, where the effort made by Australian and Singaporean governments to attract non-local students to study in their higher education institutions is described, Hong Kong lags behind these two exporting countries in terms of its level of research funding as a share of GDP, and the percentage of its local population getting access to full-time studies at the Ug level.

5.2.1.1   Increase in research funding

To enable Hong Kong's higher education service to be internationally competitive in order to attract non-local students at the RPg level of study, an increase in research funding is necessary.

5.2.1.2   Increase in undergraduate enrolment rate

Singapore, by its expansion of subsidized university places (Chapter 1) and its strategic move in recruiting overseas students sets an example that emphasizes the importance of providing access to higher education to a significant portion of the local student population, with a proper mix of local and non-local students in HEIs. There is a need for Hong Kong's higher education sector to review the current situation that 18% of the local student population at the relevant age-group gets access to 14,500 publicly-funded first-year Ug places. An increase of the Ug enrolment rate is recommended. An increase in public funding of higher education at the Ug level and the development of private universities are ways to raise the Ug enrolment ratios.

5.2.2   Increasing admission quota for non-local students

The increase in admission quotas of non-local students from 10% to 20% of the approved student numbers for publicly funded programmes from the 2008-2009 academic year is an important step forward to expand the non-local student population size. It is recommended that a further increase in the admission of

non-local students (if appropriate at all) could be done by increasing the total number of UGC-funded places while keeping the admission quota of non-local students at the 20% level.

At the operational level, while the additional student number targets fall outside the UGC-funded places, the increased admission quota for non-local students may lead to a concentration of non-local students in those highly competitive programmes that are very attractive to both local and non-local students. Consequently, it is worthwhile to consider the desirability of limiting the extent of (over) enrolment of non-local students in highly competitive programmes. This will help ensure that the admission of non-local students is less likely to reduce the chance of local students getting admitted to these programmes, and that a proper mix of local and non-local students will result in these programmes. Besides, it is recommended that the aforementioned increase in the total number of UGC-funded places can be skewed towards Ug places in these highly competitive and highly attractive programmes..

As apparent in the current composition of the non-local student population, the predominant number of students are from the Chinese Mainland (Chapter 3). There needs to be a review of this situation and measures put in place to attract non-local students from the other Asian countries and other parts of the world to fully utilize the increase in admission quota from the 2008/09 academic year onwards.

5.2.3   Increasing student accommodation

Hostel life is an integral part of university education. Inadequate hostel accommodation is a constraint on the export of Hong Kong's higher education (Chapter 4). The government and HEIs are already aware of the urgent need of finding ways to accommodate non-local students. Measures like the building of more hostels, the construction of "joint hostels", provision of accommodation subsidies, are being considered and some need to be in place as soon as possible. In the process, the needs of specific non-local student groups, e.g. non-local students with spouse / family, have to be accommodated.

It is considered that hostel life in different HEIs can constitute worthwhile experiences in the long run for both local and non-local students and reflect the unique characteristics of individual HEIs in a diversified higher education system in Hong Kong.

5.2.4   Maintaining quality assurance of higher education

To enable Hong Kong's higher education service to be competitive in the international arena and to enhance the sustainability of its exports, the quality assurance of higher education is vital to the credibility of higher education services in the Asian countries. Quality assurance mechanisms and measures of the higher education sector at the institutional and system levels play a crucial role in maintaining the high standard of Hong Kong's higher education service (Chapter 4).

Drawing experience from recent controversies over quality issues related to Associated Degrees, it is recommended that the higher education sector sustains and enhances the quality assurance responsibilities of the QA Council, the HKCAAVQ, the JQRC, and the NLHPEC.   Two aspects are especially important. First, it is recommended that relevant bodies enhance quality assurance measures in regard to the international dimension of higher education such as programme and organizational dimensions of HEIs related to the recruitment of non-local students, their studies and different aspects of life, etc.   Second, it is important to provide clear, full and reliable information about HEIs and their programmes as well as about the quality assurance system to local and non-local stakeholders.

 5.2.5   Qualifications recognition, credit transfer system and partnership
          arrangements

Financial assistantship, qualifications recognition, the presence of credit transfer systems across HEIs and across borders are regarded as critical issues of concern (Chapter 4). It is recommended that the government enters into policy dialogues and international agreements regarding these issues in the form of a Memorandum of Understanding with the Ministry of Education of selected Asian countries at the Government-to-Government (G-to-G) level. The dialogues and agreements can cover broad issues like reciprocity in government-sponsored overseas studies between Hong Kong and the selected Asian countries, qualifications recognition, licensure for professional practice, credit transfer systems, and partnership between higher education sectors.

With the international agreements at the G-to-G level, the HUCOM can take the lead to hold regular higher education forums which provide a platform for Hong Kong's higher education service providers and key universities and post-secondary

institutions of selected countries to negotiate the aforementioned issues at more operational levels.

5.3 Support from other sectors of society

The development of Hong Kong as an education hub goes beyond the concern of the higher education sector. We learn that Hong Kong itself has attractions to non-local students and there are a number of inadequacies of exporting Hong Kong's higher education that need to be overcome by the concerted efforts of the higher education sector and other sectors of the wider society (Chapter 4).

5.3.1   Sustaining Hong Kong's attractions to non-local students

Various stakeholder groups viewed that Hong Kong has its strength as a first-class international city which possesses economic, political, social and cultural attractions to non-local students. Policies and measures, taken by the government and other sectors of the wider society to make Hong Kong a good place to live in, such as combating air pollution, keeping Hong Kong clean and enhancing freedom of speech,   are necessary (Chapter 4).

5.3.2   Creating facilitating conditions to attract non-local students to study in Hong Kong

Various stakeholder groups (Chapter 4) recommended financial support in the form of scholarships and / or bank loans, work during studies, internship opportunities, stay after graduation as facilitating conditions that attract students from the Asian countries.

Since the promulgation of the 2007 Policy Address, the government's setting up of an endowment fund for scholarship provision, employment-related initiatives and measures for retaining non-local students to stay and work in Hong Kong help create facilitating conditions to attract non-local students from the Asian countries.

Beyond the public sector, other sectors can also be involved in creating facilitating conditions for non-local students to pursue studies in Hong Kong. Such involvement includes support from the banking sector by offering loans to non-local students with financial need and support from industry and service sectors to provide internship opportunities for non-local students.

5.3.3   Promoting community understanding and social integration

The creation of these facilitating conditions involves adjustment to government policies regarding population and immigration, and support from other sectors of society, because they will have profound impact on both the higher education sector and the wider society of Hong Kong. Community reaction needs to be carefully considered.

Measures need to be undertaken to prepare the community for these changes and ensure its readiness to integrate non-local students into different walks of local life during and after their studies in Hong Kong. It is necessary to promote the local community's understanding of the rationale and potential benefits of the internationalization of higher education, its related policy changes and its impact on various sectors of the local community.

Measures such as local home-stay arrangements for non-local students and other forms of community activities that encourage the social integration of local students / citizens and non-local students can be taken to provide incentives for the integration of non-local students into the different walks of life of the local community. The change in population composition engendered by the development of Hong Kong as an education hub will have profound impact on the wider society. However the integration of non-local students during their studies and after their graduation into the different walks of life in Hong Kong is very important to the harmony of society.

5.4 Summary

To facilitate developing Hong Kong as an education hub in the region, this chapter has made recommendations regarding different policy areas at the system level, namely strategic issues and structural arrangements, the higher education policy, as well as social policies and support from other sectors of society.

<div align="center">**CHAPTER SIX**</div>

<div align="center"># RECOMMENDATIONS AT THE INSTITUTIONAL LEVEL</div>

With reference to the findings in previous chapters, this chapter makes recommendations at the institutional level for the development of Hong Kong as a regional education hub. They are divided into three groups: (1) organizational recommendations (2) programme recommendations about language policy and other similar issues; and (3) recommendations which address the social and cultural needs of non-local students.

6.1 Organizational dimensions

6.1.1 Position-taking of individual HEIs

International higher education has been increasingly seen as a global positional commodity that facilitates people's mobility and changing identity. The global capacity of an individual HEI depends on its global position and its position-taking (Marginson, 2006). Hong Kong HEIs in general have already been taking an active role in upgrading their global position and positioning themselves in the policy context of developing Hong Kong as a regional education hub. They recruited 6217 non-local students in 2006/07 (Chapter 3). Self-financed programmes offered by some UGC and non-UGC-funded institutions also succeeded in attracting a handsome number of non-local students (Chapter 3). Considerable progress in global capacity among the HEIs since the Chief Executive's visioning of Hong Kong as an education hub in 2004 is evident.

Currently most of our non-local students come from the Chinese Mainland and a few are from the Asian countries (Chapter 3). However, there are global competition forces in development of education hub in the Asian countries, especially from adjacent regions such as Singapore and Australia.

It is recommended that individual HEIs take a further in-depth analysis of the existing and potential strengths of their institutions so as to develop strategic positioning plans and optimize their potentials in the global operation. These include, for example, researching the choices of Asian countries for specific programmes, examining the modes of exporting their programmes and developing strategies of

market entry into selected Asian countries. To different HEIs, their positioning and strategies may be different.

6.1.2   Collaboration among institutions to build the image of HK higher education

Despite the fact that three universities in Hong Kong ranked in the *Times Higher Education Supplement* among the world's top 100 universities in 2007, findings of the present study show that Hong Kong's higher education is virtually invisible in some Asian countries (Chapter 3). It appears that the attractiveness of an HEI not only depends on its own reputation but also on the overall perception of the quality of higher education in its country because many students tend to separate countries rather than institutions into reputation tiers (OECD, 2004). The literature shows that some higher education exporting countries have their own organization to promote their higher education overseas. For example, Universities UK has worked with its 131 partner universities and encourages them to share findings and skills with business (Universities UK, 2007). The concerted effort of the institutions is beneficial to the promotion of the overall image of higher education services.

It is recommended that HEIs could create more regional opportunities in Hong Kong to enhance the visibility of the academic excellence of Hong Kong's HEIs and establish the image of Hong Kong higher education. For example, more inter-institutional, regional conferences could be organized in Hong Kong to disseminate regional research outputs and professional products. Hong Kong HEIs could collaborate to host more seminars and conferences with international schools of APEC and ASEAN countries so as to develop a leading position for Hong Kong's higher education services in the region.

6.1.3   Developing shared vision among stakeholders

Effective implementation of the internationalization of higher education in an HEI requires a shared vision among its stakeholders at different levels. There was concern that all academic staff had developed the same perspectives of internationalizing of higher education as their senior management. Local students' attitudes towards internationalization were also in question as some inbound students reported difficulties in integrating with local students (Chapter 4).

It is understandable that different stakeholders vary in their departure points when Hong Kong is in a transition period of internationalizing its higher education. To

facilitate the development of a shared vision, it is recommended that multiple channels such as forums, surveys and chat rooms need to be organized for all stakeholders in the institutions to deliberate and debate on their views and plans about bringing in non-local students to the campus. Some major issues that need to be discussed are:

a. The integration of an international dimension involves not only change of perspectives but also resources. What are the incentives and support to integrate the international dimension to those courses that already have excessive demand from local students?

b. There are various purposes in exporting higher education services. Is it for profit-making, is it for attracting talent to Hong Kong or for nurturing global citizenship?

c. Non-local students tend to have concentrated enrollment in specific disciplines in the universities. What is an equitable balance between non-local and local students in the same high demand courses and institutions?

d. While more diversity is envisaged for the campus, there are different views concerning the medium of instruction (MOI) in HEIs among different stakeholders. What are the guiding principles for the choice of MOI at the module, programme and institutional levels?

6.1.4 Establishing communication networks between institutional units for international education

In response to the internationalization of higher education, most HEIs have developed international offices or centres to support international education. Given the rapid development of international education in recent years, various units have been established in the HEIs for the management of UGC-funded undergraduate and postgraduate programmes, student exchange as well as programmes in the CPE arms (Chapter 3).

To facilitate the planning, marketing and implementation of international higher education, it is recommended that more communication networks between the institutional units for international education have to be developed. It is expected that the intra and inter-institutional collaboration for international education in HEIs

can be enhanced when there is an efficient information flow. This will also improve the liaison between the HEIs and relevant government / non-government and executive bodies which co-ordinate policies and resource provision for the internationalization of higher education.

6.2 Programme dimensions

6.2.1 Developing a flexible MOI policy

The use of English as a medium of instruction is commonly accepted as important in all HEIs in Hong Kong and institutions have been proactive in developing a MOI policy that is aligned with their strategic development plans. However some of the non-local students from selected Asian countries indicated a concern over the quality of the language proficiency of some academic staff and they found Cantonese the dominant language used by the local students (Chapter 4).

Institutional capacity in English is essential to effective international higher education. At the same time, the importance of Putonghua has been pointed out as it is spoken by more than one billion people (Marginson & van der Wende, 2007). With its unique position as a city where East meets West, it is important that HEIs can optimize their potential to attract non-local students by providing an English-rich and Putonghua-rich learning environment in the campus.

It is recommended that HEIs develop a flexible MOI policy as to whether English, Putonghua or Cantonese be used as MOI at programme level so as to maximize the niches of individual programmes in their institutions and cater for the needs of both local and non-local students. For example, different MOIs can be adopted in different modules or programmes in an institution. Language courses and courses on academic writing can be provided to non-local students whose mother tongue is non-English. The provision for non-local students to do internship or practicum in their home countries will help overcome the language barrier problems in certain programmes.

6.2.2 Developing flexible programmes, delivery modes and tuition fees system

The proposed '3+3+4' academic system, which comprises a three-year junior, three-year senior secondary education and a four-year Ug degree, requires students to spend one more year in the undergraduate studies as compared with the current '3+2+2+3' British academic structure (Secondary One to Three, Secondary Four to Five [HKCEE], Secondary Six to Seven [A level] plus a three-year Ug degree).

Many HEI stakeholders expressed their worries that the change of the academic structure will make Hong Kong higher education studies more costly and less attractive, especially to those students in Malaysia and India because they adhere to the British education structure (Chapter 4)

To enhance the attractiveness of Ug studies when the '3+3+4' academic structure exerts its impact on Hong Kong's HEIs in 2012, it is recommended that institutions devise flexible programme structure and delivery modes, which go with a flexible tuition fees system to accommodate both students' learning needs and financial considerations. Credit exemption for studies of A-levels in students' home countries and a modular system are some possible measures to reduce the length of study in Hong Kong. Financial subsidies such as scholarships and studentships can be introduced to attract talented students in developing countries. Twinning programmes, mixed modes of distance education with interactive internet-based delivery mode and some form of face-to-face pedagogical or administrative contact can also reduce the cost for non-local students. Nevertheless, related funding implications of such measures to the HEIs need to be properly addressed.

6.3 Social and cultural dimensions

6.3.1 Raising multicultural awareness and social support

While the security of the campus in Hong Kong has been highly praised by non-local students, some inbound students from the Asian region suffered from being homesick, voiced concerns about social integration and the lack of their familiar diets (Chapter 4). Multicultural awareness needs to be raised in the campus and social support to non-local students needs to be enhanced to attract overseas students. This could be done through formal and informal curricula. It also needs to involve the cultural awareness of academic and administrative staff, as well as the local students and the community at large.

It is recommended that a whole-campus approach should be adopted to promote multicultural awareness and social support to non-local students.

a. The perspective of being multicultural as a comparative advantage for HEIs needs to be nurtured among academic and administrative staff, supporting services providers and local students in the campus. Multicultural education modules, which develop deeper understanding of one's own culture and cultural identity, as

well as racial and cross-cultural consciousness and the respect of cultural diversities, can be promoted in the formal curriculum such as General Education.

b. Cohort dynamics has to be considered in the arrangement of tutorial groups and hostel assignments to promote cultural mix and build students' intercultural awareness, knowledge and competence. However, a delicate balance with non-local students' emotional need for companionship with their own ethnic groups needs to be considered.

c. The Hindi and Islamic religious backgrounds of the students from the Asian countries need to be attended to. Prayers rooms need to be created on campus. More variations in the choice of food in the student canteens and the provision of information about ethnic restaurants can create a more inviting social environment for the non-local students.

d. A Student Affairs Office (SAO) in the HEIs can play an active role in recruiting families for home-stay arrangements during holidays to ease students' homesick and help them enjoy their stay in Hong Kong.

e. More inter-culturally sensitive activities for local and non-local students can be organized by the student unions or SAOs. International Student Clubs can be established to enrich students' cultural exposure and extend their social network.

6.4 Summary

To enhance the capacity of developing Hong Kong as an education hub and an exporter of higher education, seven recommendations are made to the HEIs from the organizational, programme, social and cultural dimensions. The HEIs should (1) develop strategic positioning plans in the global operation; (2) strengthen inter-institutional collaboration to build the image of Hong Kong higher education; (3) establish multiple channels for stakeholders to deliberate and develop a shared vision on international higher education, (4) establish communication networks among institutional units for an efficient information flow and better liaison, (5) develop a flexible MOI policy as to whether English, Putonghua or Cantonese be used as MOI at the programme level to cater for student needs, (6) devise a flexible programme structure, delivery modes and tuition fee systems, and (7) adopt a whole-campus approach to promote multicultural awareness and social support to non-local students.

CONCLUDING REMARKS

This technical report has presented the findings and recommendations of a preliminary study of the development of Hong Kong as a regional education hub. It covers an overview of the current situation of internationalizing and exporting higher education services in Hong Kong, the views of non-local students in selected Asian countries, the experiences of Singapore and Australia in exporting higher education services overseas, and an analysis of issues and challenges in exportation of higher education services. The analysis provides policy and strategy implications for making recommendations at both system and institutional levels in the hope that the prospect of Hong Kong's development as a regional education hub could be enhanced.

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Appendices

A Technical Research Report on
The Development of Hong Kong as
A Regional Education Hub

March 2009

CONTENTS

Interview guides for local policy makers /service providers/ potential partners (consulate)

A. Introduction: partnership experiences

   a. Could you share with us your experiences with overseas institutions in offering higher education in your country?

   b. What are some of the benefits and challenges when partnering up with other overseas universities to offer higher education in your country?

   c. What areas of study and academic degrees are you interested in developing with overseas institutions?

B. Students and programmes in the target markets

   a. What are the most popular programs (e.g diploma, degree, etc.) and study areas in demands for local students for overseas higher education?

   b. What is your clientele?

   c. Which countries are your preferred choices of partnership?   Why and why not?

   d. Compared to other countries e.g. UK, Australia, US(?), and Singapore, what are some of the advantages and concerns of partnering up with Hong Kong universities in offering higher education in your country?

   e. What are the major reasons for students studying overseas? (This provides another sources of data to understand the overall reasons, please refer to the student survey)

   f. What are the major factors that hinder students to pursue study overseas? How do the local agents and government offices can help to overcome? (This can help to understand the overall and non-personal level factors)

C. Understanding HK higher education

   a. How well do you understand about HK higher education?

   b. How attractive and renowned is Hong Kong higher education (both inbound and outbound) to local students?

   c. What are the niches and weaknesses of Hong Kong higher education if provided to your local students?

D. Factors that facilitate and hinders the provision of HK higher education services

What are the major factors at the policy level, operational level, that may hinder or facilitate (1) students to pursue study in Hong Kong; (2) students to take HK higher education programmes locally at home city;   and (3) the partnership between the local agent and HK higher education providers to support student to pursue HK higher education programmes ?

- How can the partnership with the local agents or local government offices help to address the above difficulties and constraints?

E. Promotion strategies of HK higher education services

a. What do you think are the most effective strategies for promoting Hong Kong higher education services to local students, parents and schools?

b. What kinds of support can the local government offices or other agents help to promote HK higher education?

c. What can be done (and by whom) to make Hong Kong a more attractive place to study?

d. Would you give some examples of successful strategies used before (Success stories (case study)?

(ask for some printed information or web-site information)

Interview guides for local service providers (Hong Kong)/potential partners/policy makers

A. Students and programmes in the target markets

a.   What are the most popular programs (e.g. diploma, degree, etc.) and study areas in demands for overseas students?

b.   Which of them are non-government subsidized programmes?

c.   What is your clientele? What are the populations of the overseas students who are not from Mainland China, and currently enrolling your programmes?

d.   How do you attract overseas students to study in your institute?
   i.   Are they provided with scholarship?
   ii. Are they also funded by UGC?
   iii. Are they offered with part-time job (TA/RA) at the campus?
   iv. Are they provided with any personal support? (e.g. language, food, social and culture life in Hong Kong etc.)

e.   Have you had any overseas office / agents to promote your programme? If yes, can you tell me some of your experiences?

f.   What do you think are the major reasons for overseas students studying higher education in Hong Kong?

g.   What are the major factors that hinder overseas students to pursue higher education in Hong Kong?

h.   How can the overseas agents/ providers and /or HK government offices help to overcome the hindrance? (e.g. providing part-time job, student loan)

B. Introduction: partnership experiences

a.   Could you share with us your experiences with overseas institutions in offering higher education in Hong Kong or overseas countries?

b.   What are some of the benefits and challenges when partnering up with other overseas universities to offer higher education?

c.   What areas of study and academic degrees are you interested in developing (with overseas institutes) to attract overseas students?

C. Promotion strategies of HK higher education services

a.   What do you think are the most effective strategies for promoting Hong Kong higher education services to overseas students, parents and schools?

b.   What kinds of support can the Hong Kong government offices or overseas agents and Hong Kong service providers/ government help to promote HK higher education?

c.   What can be done (and by whom) to make Hong Kong a more attractive place to study?

d.   Would you give some examples of successful strategies used before (Success stories, case study)?

e. Can you introduce to us some of the students from India, Indonesia and Malaysia (or from other Asian countries) so that we can arrange individual or focus group interviews with them?

f. As far as you know, is there any alumni formed among these overseas students?

Inbound student interview

We are a team of faculty members at the Department of Educational Policy and Administration of the Hong Kong Institute of Education. We are currently commissioned by the Hong Kong Trade Development Council to conduct a research that helps promote Hong Kong's higher education services to overseas students. As you are currently studying higher education in Hong Kong, we would like to invite you to answer the following questions. The information collected will be kept **strictly confidential** and will remain **anonymous**.

Your help is much appreciated!
_____

(A)

1. Please introduce yourself to us. (Where do you come from? which institute are you studying now in HK? what programme are you studying and in what year now, etc.)

2. Why do you choose to study in HK (in comparison with home country and other foreign countries)? Do you have any friends or relatives studying in Hong Kong now?) / What are the main reasons for your pursuing higher education in Hong Kong?

3. The decision of studying higher education in Hong Kong is made

   □ Jointly by parents/guardians and the student concerned
   □ Solely by parents/guardians
   □ Solely by student concerned
   □ Others, please specify _____

4. Before you first came to Hong Kong, how much did you know about higher education in Hong Kong?

5. Through what types of channels have you found out about Hong Kong higher education?

   □ Internet
   □ Television
   □ Newspaper
   □ Magazines
   □ Exhibition
   □ Education agents
   □ Others, please specify _____

6. Among these channels, what do you think are the most effective one(s)?

7. What is your overall impression of promotional activities of Hong Kong higher education in your country?

8. With whom have you consulted when planning studying in Hong Kong?

   □ Parents/Guardians
   □ Teachers
   □ Agents of international education
   □ International education office of Ministry of Education
   □ Representatives of Hong Kong education providers at education fairs
   □ Others, please specify _____

(B)

9. Considering your experiences in Hong Kong, will you recommend your friends/relatives to come to study higher education in Hong Kong?   Why and why not?

10. What are your main challenges/hindrance of studying in HK?

11. Which of the following financial assistantship you are now receiving for your study in Hong Kong?

      □ Scholarship
      □ Low-interest loan
      □ Assistantship/Part-time job
      □ I don't need assistantship
      □ Others: _____

12. What are your suggestions to make HK higher education more attractive to students in your country?

13. Do you have anything else related to the studying in Hong Kong that you would like to share with us?

-Thank You-

☺

Interview guides (for competitors)

We are faculty members of the Hong Kong Institute of Education, Hong Kong. We are currently commissioned by the Hong Kong Trade Development Council to conduct a research that helps to promote international collaboration on provision of Hong Kong's higher education services outside Mainland China.

Thank you very much for accepting our interview invitation. The below are some of the key questions we would like to understand and discuss with you:

A. Experiences in offering higher education overseas

1. Could you share with us your experiences in offering higher education to other countries?

2. What are some of the benefits and challenges to offer higher education to other countries?

3. What areas of study and academic degrees are you interested in offering to overseas students?

B. Students and programmes

1. What are the most popular programs (e.g diploma, degree, etc.) and study areas in demands for overseas students?

2. What are the main characteristics of the overseas students who are likely to pursue higher education in your country?

3. Which countries are your preferred choices of partnership or providing overseas higher education?   Why?

4. What are the major reasons for students studying in your country?

5. What are the major factors that hinder students to pursue study in your country? How do the local agents, and government offices, and service providers/government can help to overcome these obstacles?

C.Understanding higher education in your country

1. How well do overseas students understand about higher education in your country?

2. How attractive and renowned is higher education in your country (both inbound and outbound) to overseas students?

3. What are the niches and weaknesses of your higher education if provided to your overseas students?

D. Factors that facilitate and hinders the provision of your higher education services

1. What are the major factors at the policy level, operational level, that may hinder or facilitate:

    a. Students to pursue study in your country?

    b. Students to take your higher education programmes locally at home city?

    c. The partnership between the local agent and your higher education providers to support student to pursue higher education programmes in your country?

2. How can the partnership with the local agents or local government offices and service providers/government help to address the above difficulties and constraints?

E. Promotion strategies of your education services

1. What do you think are the most effective strategies for promoting your higher education services to overseas students, parents and schools?

2. What kinds of support can the local government offices or other agents and service providers/government help to promote higher education in your country?

3. What can be done (and by whom) to make your country a more attractive place to study?

4. Would you give some examples of successful strategies used before (Success stories (case study) in promoting overseas higher education to overseas students?

(End)

Interview with the Immigration Department representative

July 2007, prepared by the HKIEd Project Team

We are faculty members of the Hong Kong Institute of Education. We are currently commissioned by the Hong Kong Trade Development Council to conduct a research that helps promote Hong Kong's higher education to overseas students.

Thank you very much for accepting our interview invitation. The purpose of the interview is to seek understanding of the issues related to the education hub policy. Your participation in the interview will greatly contribute to knowledge that will further facilitate our undertaking of the research project, which will benefit the future development of higher education in Hong Kong.

Below are the key questions we would like to understand and discuss with you.

A. Immigration policy on education

1. With respect to the current immigration policy on education, what are the facilitators and barriers to the export of higher education services to overseas countries (especially with respect to the potential markets of India, Indonesia, and Malaysia)?

   o Entry arrangements

   o Extension of stay

   o Change of educational institutions and programmes, and termination of study

   o Condition of stay, employment during course and after completion of studies

   o Entry of dependants, and related extension of stay

B. The education hub policy

1. What is the Immigration Department's role / plan in connection of the promotion of Hong Kong higher education sector to serve as "the education hub of the region"?

2. At the system level, how is the Immigration Department's work related to / coordinate with other parties, e.g. higher education providers, policy and executive bodies like the University Grants Committee, the Education Bureau, the Trade Development Council, other relevant bodies, etc in promoting the Hong Kong higher education sector to serve as "the education hub of the region"?

3. At the system level, which policies / mechanisms, etc need to be initiated / changed to support the Education Hub Policy? Which aspects of the immigration policy (e.g. immigration policy on education, policy on quality migrants, etc) may need to be changed to support the Education Hub Policy?

C. Promotion strategies of HK higher education services

1. What do you think are the most effective strategies for promoting Hong Kong higher education services to overseas students, parents and schools?

2. What kinds of support can the Hong Kong government offices or overseas

agents and Hong Kong service providers/ government help to promote Hong Kong higher education?

3. What can be done (and by whom) to make Hong Kong a more attractive place to study?

4. What role can the Immigration Department play in the promotion of Hong Kong higher education services to overseas markets?

Interview with the Trade Development Council representative

July 2007, prepared by the HKIEd Project Team

We are faculty members of the Hong Kong Institute of Education. We are currently commissioned by the Hong Kong Trade Development Council to conduct a research that helps promote Hong Kong's higher education to overseas students.

Thank you very much for accepting our interview invitation. The purpose of the interview is to seek understanding of the issues related to the education hub policy. Your participation in the interview will greatly contribute to knowledge that will further facilitate our undertaking of the research project, which will benefit the future development of higher education in Hong Kong.

Below are the key questions we would like to understand and discuss with you.

A. The education hub policy

1. What is the Trade Development Council's role / plan in connection of the promotion of Hong Kong higher education sector to serve as "the education hub of the region"?

2. At the system level, how is the Trade Development Council's work related to / co-ordinated with other parties, e.g. higher education providers, policy and executive bodies like the University Grants Committee, the Education Bureau, the Immigration Department, other relevant bodies, etc in promoting the Hong Kong higher education sector to serve as "the education hub of the region"?

B. Promotion strategies of HK higher education services

1. What do you think are the most effective strategies for promoting Hong Kong higher education services to overseas students, parents and schools?

2. What role can the Trade Development Council play in the promotion of Hong Kong higher education services to overseas markets?

<u>Interview with UGC representative</u>

July 2007, prepared by the HKIEd Project Team

We are faculty members of the Hong Kong Institute of Education. We are currently commissioned by the Hong Kong Trade Development Council to conduct a research that helps promote Hong Kong's higher education to overseas students.

Thank you very much for accepting our interview invitation. The purpose of the interview is to seek understanding of the issues related to the education hub policy. Your participation in the interview will greatly contribute to knowledge that will further facilitate our undertaking of the research project, which will benefit the future development of higher education in Hong Kong.

Below are the key questions we would like to understand and discuss with you. Apart from the interview, we would also like to seek your help with providing statistics on non-local students with reference to Appendix 1.

Key interview questions

A. The education hub policy

"The UGC sees the Hong Kong higher education sector serving as "the education hub of the region" driving forward the economic and social development of Hong Kong, in the context of our unique relationship with Mainland China and the region." (Extracts from UGC website)

"…the UGC has come to the conclusion that the whole of Hong Kong's higher education sector should be viewed as one force in the regional and international higher education arena. The whole of the higher education sector should seek to achieve the goal of developing Hong Kong into the education hub of the region. Each institution should contribute to this endeavor in its own differing and unique way and in a complementary manner." (Extracts from UGC 2004 document "Hong Kong Higher Education, To Make a Difference, To Move with the Times")

1. What is the aim of the Education Hub Policy?

2. One aspect of the Education Hub Policy is admission of overseas students. What is the current policy / mechanism on admission of overseas students in the Hong Kong higher education sector? (E.g. different types of degree programmes, funding policy, allocation of places, etc)? Will there be a change in this policy / mechanism in the near future?

3. What are the incentives for higher education providers to contribute to the Education Hub Policy?

4. What are the difficulties in initiating and promoting the Education Hub Policy?

5. What is the UGC's role / the UGC's plan in promoting the Hong Kong higher education sector to serve as "the education hub of the region"?

6. At the system level, how is the UGC's work related to / co-ordinated with other parties, e.g. higher education providers, policy and executive bodies like the EDB, the Immigration Department, the Trade Development Council, other relevant bodies, etc in promoting Hong Kong higher education sector to serve as "the education hub of the region"?

7. At the system level, which policies / mechanisms, etc need to be initiated / changed to support the Education Hub Policy?

B. Promotion strategies of HK higher education services

1. What do you think are the most effective strategies for promoting Hong Kong higher education services to overseas students, parents and schools?

2. What kinds of support can the Hong Kong government offices or overseas agents and Hong Kong service providers/ government help to promote Hong Kong higher education?

3. What can be done (and by whom) to make Hong Kong a more attractive place to study?

4. What role can the UGC play in the promotion of Hong Kong higher education services to overseas markets?

C. Students and programmes in the target markets

1. What are the most popular programmes (e.g. diploma, degree, etc.) and study areas in demands for overseas students?

2. What do you think are the major reasons for overseas students studying higher education in Hong Kong?

3. What are the major factors that hinder overseas students to pursue higher education in Hong Kong?

4. What are the features of the Hong Kong higher education programmes that successfully attract overseas students?

5. What are the strengths and weaknesses of Hong Kong higher education programmes as compared to programmes in Australia, Singapore and the UK in attracting overseas students?

6. What do you think about India, Indonesia and Malaysia as potential markets for the export of Hong Kong higher education services? How about other potential markets?

Interview with the Education Bureau (EDB)

July 2007, prepared by the HKIEd Project Team

We are faculty members of the Hong Kong Institute of Education. We are currently commissioned by the Hong Kong Trade Development Council to conduct a research that helps promote Hong Kong's higher education to overseas students.

Thank you very much for accepting our interview invitation.   The purpose of the interview is to seek understanding of the issues related to the education hub policy. Your participation in the interview will greatly contribute to knowledge that will further facilitate our undertaking of the research project, which will benefit the future development of higher education in Hong Kong.

Below are the key questions we would like to understand and discuss with you.

A. The Education Hub Policy

1. What is the aim of the Education Hub Policy?

2. What is the EDB's role / the EDB's plan in promoting Hong Kong higher education sector to serve as "the education hub of the region"?

3. What are the incentives for higher education providers to contribute to the Education Hub Policy?

4. What are the difficulties in initiating and promoting the Education Hub Policy?

5. At the system level, how is the EDB's work related to / co-ordinated with other parties, e.g. higher education providers, policy and executive bodies like the UGC, the Immigration Department, the Trade Development Council, other relevant bodies, etc in promoting the Hong Kong higher education sector to serve as "the education hub of the region"?

6. At the system level, which policies / mechanisms, etc need to be initiated / changed to support the Education Hub Policy?

B. Promotion strategies of HK higher education services

1. What do you think are the most effective strategies for promoting Hong Kong higher education services to overseas students, parents and schools?

2. What kinds of support can the Hong Kong government offices or overseas agents and Hong Kong service providers/ government help to promote Hong Kong higher education?

3. What can be done (and by whom) to make Hong Kong a more attractive place to study?

4. What role can the EMB play in the promotion of Hong Kong higher education services to overseas markets?

C. Students and programmes in the target markets

1. What are the most popular programmes (e.g. diploma, degree, etc.) and study areas in demands for overseas students?

2. What do you think are the major reasons for overseas students studying higher education in Hong Kong?

3. What are the major factors that hinder overseas students to pursue higher education in Hong Kong?

4. What are the features of the Hong Kong higher education programmes that successfully attract overseas students?

5. What are the strengths and weaknesses of Hong Kong higher education programmes as compared to programmes in Australia, Singapore and the UK in attracting overseas students?

6. What do you think about India, Indonesia and Malaysia as potential markets for the export of Hong Kong higher education services? How about other potential markets?

Interview with HUCOM Standing Committee on Internationalization

August / September 2007, prepared by the HKIEd Project Team

We are faculty members of the Hong Kong Institute of Education. We are currently commissioned by the Hong Kong Trade Development Council to conduct a research that helps promote Hong Kong's higher education to overseas students.

Thank you very much for accepting our interview invitation. The purpose of the interview is to seek understanding of the issues related to the education hub policy. Your participation in the interview will greatly contribute to knowledge that will further facilitate our undertaking of the research project, which will benefit the future development of higher education in Hong Kong.

Below are the key questions we would like to understand and discuss with you.

A. Internationalization, education hub and export of higher education services

1. What is the view of HUCOM Standing Committee on Internationalization (hereafter, the Committee) on internationalization, the Education Hub policy and export of higher education services in Hong Kong?

2. What is the purpose of setting up the Committee? Structurally how is it related to higher education providers and other relevant policy & executive bodies, e.g. the inter-bureau steering committee chaired by the Chief Secretary for Administration, the UGC, the Education Bureau, the Immigration Department, the Trade Development Council, etc? How do you see its operation at this stage?

3. What are the short-term and long-term goals of the Committee?

4. What is the Committee's role in promoting Hong Kong higher education sector to serve as "the education hub of the region"?

5. What is the Committee's view on the roles and responsibilities of different higher education providers in Hong Kong with regard to the Education Hub Policy?

6. What are the incentives for higher education providers to contribute to the Education Hub Policy?

7. What are the difficulties in initiating and promoting the Education Hub Policy?

8. At the system level, which policies / mechanisms, etc need to be initiated / changed to support the Education Hub Policy?

B. Promotion strategies of HK higher education services

1. What do you think are the most effective strategies for promoting Hong Kong higher education services to overseas students, parents and schools?

2. What kinds of support can the Hong Kong government offices or overseas agents and Hong Kong service providers/ government help to promote Hong Kong higher education?

3. What can be done (and by whom) to make Hong Kong a more attractive place to study?

C. Students and programmes in the target markets

1. What are the most popular programmes (e.g. diploma, degree, etc.) and study areas in demands for overseas students?

2. What do you think are the major reasons for overseas students studying higher education in Hong Kong?

3. What are the major factors that hinder overseas students to pursue higher education in Hong Kong?

4. What are the features of the Hong Kong higher education programmes that successfully attract overseas students?   Can you suggest examples of these programmes?

5. What are the strengths and weaknesses of Hong Kong higher education programmes as compared to programmes in Australia, Singapore and the UK in attracting overseas students?

6. What do you think about India, Indonesia and Malaysia as potential markets for the export of Hong Kong higher education services?   How about other potential markets?

Interview with the Malaysia Vice Consul (Consular)

We are faculty members of the Hong Kong Institute of Education, Hong Kong. We are currently commissioned by the Hong Kong Trade Development Council to conduct a research that helps to promote international collaboration on provision of Hong Kong's higher education services outside Mainland China. Malaysia is one of our target areas.

Thank you very much for accepting our interview invitation. Below are some of the key questions we would like to understand and discuss with you.

A. Malaysian education system and Malaysian students in Hong Kong

1. Please introduce briefly the population structure of Malaysia, Malaysian school education and higher education system.

2. What is the current situation of Malaysian students studying in higher education in Hong Kong? (e.g. number of students, programmes undertaking , mode of finance etc.)

B. Students and programmes

1. What are the major reasons for Malaysian students studying overseas? Which countries are the most popular choice for them?

2. What are the main characteristics of the Malaysian students who are likely to pursue higher education overseas?

3. What are the most popular programs (e.g. diploma, degree, etc.) and study areas in demands for Malaysian students for overseas higher education?

4. When Malaysian students complete their overseas studies, will they start their career in Malaysia or elsewhere in the world? Are overseas qualifications well-recognized in Malaysia for employment in public and private sectors?

C. Understanding HK higher education

1. How well do Malaysian parents and students understand about Hong Kong higher education?
2. How attractive and renowned is Hong Kong higher education to Malaysian students?

3. What are the niches and weaknesses of Hong Kong higher education if provided to Malaysian students?

4. Compared to other countries e.g. UK, Australia, US, and Singapore, what are the advantages and concerns / difficulties for Malaysian students to pursue overseas studies in Hong Kong?

D. Factors that facilitate and hinder the provision of Hong Kong higher education services to Malaysian students

1. What are the major factors at the policy level, operational level, that may hinder or facilitate:

   a. Malaysian students to pursue studies in Hong Kong?

      b. Malaysian students to take Hong Kong higher education programmes locally at home city?

2. How can the partnership between the Malaysian agents or Malaysian government offices and Hong Kong service providers/government help to address the above difficulties and constraints?

E. Promotion strategies of Hong Kong higher education services in Malaysia

1. What do you think are the most effective strategies for promoting Hong Kong higher education services to Malaysian students, parents and schools?

2. What kinds of support can the Malaysian government offices or other agents and Hong Kong service providers/government provide to promote Hong Kong higher education?

3. What can be done (and by whom) to make Hong Kong a more attractive place to study for Malaysian students?

4. Would you give some examples of successful strategies used before (Success stories (case study) in promoting overseas higher education to Malaysian students?

Interview with Policy Makers and School Principals in Malaysia

We are faculty members of the Hong Kong Institute of Education, Hong Kong. We are currently commissioned by the Hong Kong Trade Development Council to conduct a research that helps to promote international collaboration on provision of Hong Kong's higher education services outside Mainland China. Malaysia is one of our studied areas.

Thank you very much for accepting our interview invitation. The below are some of the key questions we would like to understand and discuss with you:

A. Partnership experiences

1. Could you share with us your experiences or views on working with overseas institutions in offering higher education in your country?

2. What are some of the benefits and challenges when working with other overseas universities (particularly those from Hong Kong) to offer higher education in your country?

3. What areas of study and academic degrees are you interested in working with overseas institutions?

B. Students and programmes

1. What are the most popular programs (e.g diploma, degree, etc.) and study areas in demands for local students for overseas higher education?

2. What are the main characteristics of the local students who are likely to pursue higher education overseas?

3. Which countries are your preferred choices of partnership or providing oversea higher education?   Why?   What about Hong Kong?

4. Compared to other countries e.g. UK, Australia, US(?), and Singapore, what are some of the advantages and concerns if   working or partnering up with Hong Kong universities in offering higher education in your country?

5. What are the major reasons for students studying overseas?

6. What are the major factors that hinder students to pursue study overseas? How do the local agents and government offices and Hong Kong service providers/government can help to overcome?

C. Understanding HK higher education

1. How well do you understand about HK higher education?

2. How attractive and renowned is Hong Kong higher education (both inbound and outbound) to local students?

3. What are the niches and weaknesses of Hong Kong higher education if provided to your local students?

D. Factors that facilitate and hinders the provision of HK higher education services

1. What are the major factors at the policy level, operational level, that may hinder or facilitate:

    a. Students to pursue study in Hong Kong?

    b. Students to take HK higher education programmes locally at home city?

    c. The partnership between the local agent and HK higher education providers to support student to pursue HK higher education programmes?

2. How can the partnership with the local agents or local government offices and Hong Kong service providers/government help to address the above difficulties and constraints?

E. Promotion strategies of HK higher education services

1. What do you think are the most effective strategies for promoting Hong Kong higher education services to local students, parents and schools?

2. What kinds of support can the local government offices or other agents and Hong Kong service providers/government help to promote HK higher education?

3. What can be done (and by whom) to make Hong Kong a more attractive place to study?

4. Would you give some examples of successful strategies used before (Success stories (case study) in promoting overseas higher education to local students?

(End)

Appendix A 2

Hong Kong student questionnaire

We are a team of faculty members at the Department of Educational Policy and Administration of the Hong Kong Institute of Education. We are currently commissioned by the Hong Kong Trade Development Council to conduct a research that helps promote Hong Kong's higher education services to overseas students.   As you are currently studying higher education in Hong Kong, we would like to invite you to answer the following questions. The information collected will be kept strictly confidential and will remain anonymous.

Your help is much appreciated!

Please tick or fill in the answer(s) where appropriate

1. What kind of degree are you pursuing in Hong Kong?

① Sub-degree or diploma	② Undergraduate	③ Master's	④ Doctorate	Others _____

2. What is your area of study of Hong Kong higher education?

  □ Biological Sciences;
  □ Medicine, Dentistry, & Health Sciences;
  □ Physical Sciences (e.g. Physics, chemistry, mathematics, etc)
  □ Electrical & Electronic Engineering;
  □ Computer Sciences/ Information technology;
  □ Engineering;
  □ Civil Engineering, Surveying, Building, and Construction;
  □ Law;
  □ Business Studies & Economics (e.g. finance, accounting, etc)
  □ Social Sciences (e.g. psychology, political science, sociology, etc)
  □ Humanities (e.g. Literature, language, history, etc)
  □ Creative Arts, Performing Arts & Design;
  □ Education (incl. physical education)
  □ Others, please specify: _____

3.   Do you have any friends or relatives studying in Hong Kong now?
  ① Yes   ②   No

4. What are the main reasons for your pursuing higher education in Hong Kong?
  (Please choose three of the following)

  □ To have better job opportunities in Hong Kong
  □ To have better job opportunities in my home country and other countries
  □ To have opportunity to immigrate to Hong Kong
  □ To broaden your international horizons and experiences
  □ To learn more about advanced knowledge and technology
  □ To have better language environment
  □ To have better learning environment (such as facilities, social, cultural, etc)
  □ Too competitive in getting a place in a good local university in my home country
  □ Affordable cost
  □ To meet my parents' expectations
  □ To be my important personal goal
  □ To be less stressful in studying overseas
  □ Others, please specify: _____

5. Before you first came to Hong Kong, how much did you know about higher education in
   Hong Kong?

① Very well	② Fairly well	③ Adequate	④ Little	⑤ Very little

6. What are your main challenges/hindrance of studying in HK?
   (Please choose three of the following)

   □ Lack of information about Hong Kong higher education in my home country
   □ Higher education in Hong Kong may not be so attractive and advanced
   □ May not have better job opportunities in Hong Kong
   □ May not have better job opportunities in my home country and other countries
   □ May not have opportunity to immigrate to Hong Kong
   □ The total cost of studying is too expensive
   □ Language is a barrier for me to study in Hong Kong
   □ The social/ cultural environment is not appropriate for me
   □ I am not getting used to the food in Hong Kong
   □ Academic credentials earned in HK may not be recognized in my country
   □ It is not my parents' expectation
   □ It is not my personal goal
   □ It is too stressful in studying in Hong Kong
   □ Others, please specify: _____

7. Which of the following financial assistantship you are now receiving for your study in
   Hong Kong?

   □ Scholarship
   □ Low-interest loan
   □ Assistantship/Part-time job
   □ I don't need assistantship
   □ Others: _____

8. Considering your experiences in Hong Kong, would you recommend your
   friends/relatives to come to study higher education in Hong Kong?

   ① Yes   ②   No

Why or why not?
_____
_____

9. What is your overall impression of promotional activities of Hong Kong higher education
   in your country?

   □ Visible   □ Not visible   □ Don't know

10. Through what types of channels have you found out about Hong Kong higher
    education?

   □ Internet
   □ Television
   □ Newspaper
   □ Magazines
   □ Exhibition
   □ Education agents
   □ Others, please specify _____

11. Among these channels, what do you think are the most effective one(s)?

_____

12. The decision of studying higher education in Hong Kong is made

    □ Jointly by parents/guardians and the student concerned
    □ Solely by parents/guardians
    □ Solely by student concerned
    □ Others, please specify _____

13. With whom would you consult when planning studying in Hong Kong?

    □ Parents/Guardians
    □ Teachers
    □ Agents of international education
    □ International education office of Ministry of Education
    □ Representatives of Hong Kong education providers at education fairs
    □ Others, please specify _____

Personal Information:

1. Your age?	Years Old
2. Your gender? (only for written survey)	① Male ② Female
3. Where are you from?	Country _____City_____
4. Your tuition fee per year	_____
5. Level of study?	_____
6. Program of study?	_____
7. Name of Institution	_____
8. Please check the correct box.	□ Alumni □ Current Student

-Thank You-

List of data collection from local respondents through face-to face interviews (I), focus group interviews (FGI), telephone interviews (TI) and email questionnaires (EQ) as at December 2007

Institutions		
Higher education institution 1 (admission office, undergraduate programme) (I)	Higher education institution 1 (Graduate school) (TI)	Higher education institution 1 (Department of Master in Business Administration (MBA) (I)
Higher education institution 2 (International students and programmes) (I)	Higher education institution 2 (Research Office) (I)	Higher education institution 3 (Associate Vice President, academic affairs) (I)
High education institution 4 (Registrar) (I)	Higher education institution 5 (International Office, Undergraduate). (I)	Higher education institution 5 (Research Office) (I)
Higher education institution 5 (College of Professional and Continuing Education) (I)	Higher education institution 6 (School of Continuous Professional Education) (I)	Higher education institution 6 (Office of Strategic and Academic Planning) (I)
Higher education institution 6 (Centre of International Education) (I)	Higher education institution 6 (Registrar) (I)	Higher education institution 7 (International Office) (I)
Higher education institution 7 (School of Continuing and Professional Education) (I)	Higher education institution 8 (Registrar) (1)	Higher education institution 9 (MBA programme) (I)
Higher education institution 9 (International Office) (I)	Higher education institution 9 (Graduate Office) (I)	Higher education institution 9 (International Office) (I)
Higher education institution 10 (International Office	Higher education institution 11 (Registrar) (I)	

Policy makers/advisers		
Immigration Department (Visa and policy branch) (I)	Education Bureau (Assistant permanent secretary for higher education) (I)	Chairman of Standing Committee on Internationalization, HUCOM (I)
University Grant Committee (EQ & TI)	Trade Development Council (I)	

Consulates		
Malaysia (I)	Indonesia (I)	India (I)

Foreign education services providers (competitors)		
British council (I)	US International institute of education (I)	Australian consulate-general (Education, science and training) (EQ)

Students, Alumni and people concerned from target markets		
A Malaysian alumni of Polytechnic University (I)	Two Chinese Malaysian students at HKIEd (FGI)	One Chinese Indonesian students from undergraduate programmes of CUHK (I)
Four Indian PhD students (3 from HKU and 1 from UST) (FGI)	One PhD student from HKU, a Vice President of an Indonesian University, and Consul of Indonesia Consulate (FGI)	Two students of HKIEd from Mainland China (FGI)
One Indian Faculty member of HKU (I)	One Chinese Indonesian PhD student of Polytechnic University (I)	One Pakistan student from undergraduate programme of HKU (I)
Four Chinese Indonesian students from undergraduate programmes of HKU (FGI)	Three Research Postgraduate students of HKU from India, Malaysia and Indonesia (FGI)	Three Indians students from undergraduate programme of HKU (FGI)
One Chinese Malaysian student from Research postgraduate programmes of HKU (I)	Six Chinese Malaysian students from undergraduate programmes of HKU (FGI)	Two Asian students in Baptist University (FGI)

Code book and references

Code	Name of the organization
HK-H1RE-in	HIE 1 Office of Admissions and Financial Aid
HK-H1MBA-in	HIE 1 MBA programmes
HK-H1PG-inp	HIE 1 Graduate School
HK-H2EX-in	HIE 2 Academic Exchange and Collaboration Office
HK-H2CPE-in	HIE 2 College of Professional and Continuing Education
HK-H2RO-in	HIE 2 Research Office
HK-H3RE-in	HIE 3 Academic Affairs
HK-H4RE-in	HIE 4 Registry
HK-H5INT-in	HIE 5 International Students and Programs
HK-H5PG-in	HIE 5 Postgraduate Studies Administration
HK-H6INT-in	HIE 6 Centre for International Education
HK-H6CPE-in	HIE 6 School of Continuous Progress Education
HK-H6RE-in	HIE 6 Registry
HK-H7INT-in	HIE 7 External Liaison and Cooperation Office
HK-H7CPE-in	HIE 7 School of Continuing and Professional Education
HK-H8RE-in	HIE 8 Registry
HK-H9PG-in	HIE 9 Graduate School
HK-H9MBA-in	HIE 9 Faculty of Business and Economics
HK-H9RE-in	HIE 9 Academic Liaison
HK-H10INT-in	HIE 10 International Office
HK-G1-in	Hong Kong Education Bureau
HK-G2-in	Hong Kong Immigration Department
HK-G4-in	Hong Kong Trade Development Council
HK-G5-in	Hong Kong HUCOM Standing Committee on Internationalization
HK-G3-mq	UGC's reply
HK-S1ID-fgi	1 HIE 9 PhD Indonesian student, counsel general and professor
HK-S2IN-fgi	FGI, Students from 5 Indian students. 4 from HIE 9 and 1 from HIE 5. (RPg)
HK-S3O-fgi	FGI, 2 students from Mainland China from HIE 6 (Associate Degree)
HK-S4ID-in	1 Indonesia Chinese student from HIE 1. (undergraduate)
HK-S5MA-fgi	2 Malaysian Chinese student to be and worker in Hong Kong
HK-S6MA-in	1 Malaysian Alumni from HIE 2 (undergraduate)
HK-S7ID-in	1 Indonesian Chinese PhD student from HIE 2
HK-S8MAIDIN-fgi	1 Malaysian, 1 Indonesian, 1 Indian from HIE 9 PhD students (RPg students)
HK-S9ID-fgi	4 Malaysian undergraduate HIE 9 students
HK-S10MA-in	1 Malaysian MPhil HIE 9 students
HK-S11IN-fgi	3 Indian undergraduate HIE 9 students
HK-S12MA-fgi	5 Malaysian undergraduate HIE 9 students
HK-S13ID-fgi	4 Indonesian undergraduate HIE 9 students
HK-S15O-fgi	1 Singaporean, 1 Kazakhstan from HIE 10
HK-S16IN-fgi	2 Indian MBA students from HIE 9
HK-IN- C1-in	India Consulate
HK-ID- C2-in	Indonesia Consulate
HK-MA-C3-in	Malaysia Consulate

Note: this table is also applicable to appendix C

R1 = HK-H1PG-inp; HK-H10INT-in; HK-H3RE-in
R2 = HK-G1-in
R3 = HK-H6RE-in
R4 = HK-H5INT-in; HK-H6INT-in; HK-H2EX-in
R5 = HK-H8RE-in
R6 = HK-H4RE-in; HK-H8RE-in
R7 = HK-H6CPE-in
R8 = HK-H2CPE-in; HK-H6CPE-in
R9 = HK-H1RE-in; HK-H3RE-in; HK-H4RE-in; HK-H5INT-in; HK-H10INT-in
R10= HK-G5-in
R11= HK-H10INT-in
R12= HK-H5INT-in
R13= HK-H2RO-in; HK-H2EX-in; HK-H9PG-in
R14= HK-H1RE-in; HK-H5INT-in
R15= HK-H1MBA-in; HK-H9MBA-in; HK-H5PG-in
R16= HK-H9MBA-in
R17= HK-H1MBA-in
R18= HK-H5PG-in
R19= HK-ID-E2-in
R20= HK-H1RE-in; HK-H1PG-inp
R21= HK-H2EX-in; HK-H7INT-in; HK-H10INT-in
R22= HK-H2CPE-in; HK-H3RE-in; HK-H8RE-in; HK-H10INT-in
R23= HK-H2RO-in
R24= HK-H9PG-in

<u>References</u>

R1= HK-H2EX-in; HK-H3RE-in; HK-H10INT-in
R2= HK-H1RE-in; HK-H1PG-inp; HK-H2EX-in; HK-H2RO-in; HK-H3RE-in;
HK-H5PG-in; HK-H6INT-in; HK-H9RE-in; HK-H9PG-in
R3= HK-H2RO-in; HK-G3-mq
R4= HK-H1RE-in; HK-H1MBA-in; HK-H2EX-in; HK-H5INT-in; HK-H5PG-in;
HK-H6INT-in; HK-H7CPE-in; HK-S8MAIDIN-fgi; HK-H9RE-in; HK-H9MBA-in;
HK-H10INT-in; HK-G1-in
R5= HK-H5PG-in; HK-H1RE-in; HK-H1MBA-in; HK-H2EX-in; HK-H3RE-in;
HK-S3O-fgi; HK-H5INT-in; HK-H9PG-in
R6= HK-H2EX-in; HK-H7INT-in
R7= HK-H1RE-in; HK-H1MBA-in; HK-H3RE-in; HK-H4RE-in
R8= IN-G4-in; IN-HKH-in
R9= HK-H9RE-in; HK-H9MBA-in
R10= HK-G1-in
R11= HK-G1-in; HK-G3-mq
R12= HK-G5-in
R13= HK-H2RO-in; HK-H9MBA-in; HK-G3-mq
R14= HK-H2CPE-in
R15= HK-H1MBA-in; HK-H3RE-in; HK-H5PG-in; HK-H9PG-in; HK-H10INT-in;
HK-S1ID-in; HK-S2IN-in; HK-S3O-fgi; HK-S5MA-fgi; HK-S6MA-in;
HK-S7ID-in; HK-S8MAIDIN-fgi; HK-H9RE-in; HK-S11IN-fgi; HK-S12MA-fgi;
HK-S15O-fgi; HK-G3-mq
R16= HK-H2EX-in; HK-H5INT-in; HK-H9MBA-in
R17= HK-H2EX-in; HK-H2RO-in HK-H4RE-in; HK-H5INT-in; HK-H6INT-in;
HK-H7INT-in; HK-H7CPE-in; HK-H9RE-in; HK-H10INT-in; HK-G5-in
R18= HK-G1-in; HK-G5-in; HK-H6RE-in; HK-H7INT-in; HK-H9RE-in
R19= HK-G1-in; HK-H1RE-in; HK-H1MBA-in; HK-H2EX-in; HK-H2CPE-in;
HK-H4RE-in; HK-H5PG-in; HK-H9PG-in; HK-H9MBA-in HK-H10INT-in;
HK-S1ID-in; HK-S13ID-fgi; HK-G3-mq
R20= HK-H1RE-in; HK-H1PG-inp; HK-H2RO-in; HK-H5INT-in; HK-H5PG-in;
HK-H9RE-in; HK-H10INT-in; HK-S1ID-in; HK-S3O-fgi; HK-S4ID-in;
HK-S7ID-in; HK-S8MAIDIN-fgi; HK-S10MA-in; HK-ID-C2-in
R21= HK-H1RE-in; HK-H1PG-inp; HK-H2EX-in; HK-H2RO-in; HK-H3RE-in;
HK-H5INT-in; HK-H6INT-in; HK-H7INT-in; HK-H9RE-in; HK-H10INT-in;
HK-S1ID-in; HK-S4ID-in;   HK-S8MAIDIN-fgi; HK-S10MA-in; HK-S11IN-fgi;
HK-S13ID-fgi; HK-ID-C2-in
R22= HK-H2EX-in; HK-H2CPE-in; HK-H5PG-in; HK-S1ID-in; HK-G3-mq
R23= HK-H5PG-in; HK-H10INT-in
R24= HK-H2EX-in; HK-H9RE-in
R25= HK-S3O-fgi; HK-S4ID-in; HK-S5MA-fgi; HK-S6MA-in; HK-S11IN-fgi;
HK-S12MA-fgi; HK-S13ID-fgi
R26= HK-H4RE-in; HK-S1ID-in
R27= HK-H1RE-in; HK-H2RO-in; HK-H3RE-in; HK-H6CPE-in; HK-H7INT-in;
HK-S1ID-in; HK-S2IN-in; HK-S3O-fgi; HK-S8MAIDIN-fgi; HK-S10MA-in;
HK-S11IN-fgi; HK-S15O-fgi; HK-S16IN-fgi; HK-G5-in
R28= HK-H6CPE-in; HK-S3O-fgi
R29= HK-H1RE-in; HK-S2IN-fgi; HK-H2RO-in; HK-H3RE-in; HK-S10MA-in;
HK-S11IN-fgi; HK-S12MA-fgi; HK-S13ID-fgi; HK-S16IN-fgi
R30= HK-H4RE-in; HK-H5PG-in; HK-H6CPE-in; HK-S6MA-in; HK-S7ID-in;
HK-G3-mq
R31= HK-H2RO-in; HK-S6MA-in; HK-S13ID-fgi

R32= HK-H1PG-inp; HK-H4RE-in; HK-H7INT-in; HK-H9RE-in; HK-H10INT-in;
HK-S2IN-fgi; HK-S3O-fgi; HK-S7ID-in; HK-S10MA-in; HK-S11IN-fgi;
HK-S12MA-fgi HK-S13ID-fgi; HK-S15O-fgi; HK-S16IN-fgi; HK-G4-in;
HK-G5-in
R33= HK-H2EX-in; HK-H6CPE-in; HK-H7INT-in; HK-H9RE-in; HK-H9MBA-in;
HK-H10INT-in; HK-S4ID-in; HK-S5MA-fgi; HK-S6MA-in; HK-S7ID-in;
HK-S8MAIDIN-fgi; HK-S10MA-in; HK-S11IN-fgi; HK-S12MA-fgi;
HK-S13ID-fgi
R34= HK-H1PG-inp; HK-H4RE-in; HK-H7INT-in; HK-H10INT-in; HK-S3O-fgi;
HK-S7ID-in; HK-S2IN-fgi; HK-S5MA-fgi; HK-G5-in; HK-H5INT-in;
HK-H6CPE-in; HK-G5-in
R35= HK-H9MBA-in; HK-H10INT-in; HK-S1ID-in; HK-S2IN-fgi; HK-S3O-fgi;
HK-S5MA-fgi; HK-S7ID-in; HK-S11IN-fgi; HK-G4-in; HK-G5-in
R36= HK-S7ID-in
R37= HK-H1RE-in; HK-H2RO-in; HK-H5INT-in; HK-H6INT-in; HK-H7INT-in;
HK-H7CPE-in; HK-H9MBA-in; HK-H9RE-in; HK-S2IN-fgi; HK-G4-in;
HK-S5MA-fgi; HK-S10MA-in;   HK-S13ID-fgi; HK-S16IN-fgi; HK-G1-in;
HK-G3-mq; HK-G5-in
R38= HK-H1MBA-in; HK-H2CPE-in; HK-H4RE-in; HK-S13ID-fgi; HK-H9RE-in;
HK-G1-in; HK-G3-mq
R39= HK-H1PG-inp; HK-S5MA-fgi; HK-S10MA-in; HK-S15O-fgi; HK-G3-mq
R40= HK-H1PG-inp; HK-H6INT-in; HK-S4ID-in; HK-S5MA-fgi; HK-S6MA-in;
HK-S7ID-in
R41= HK-H5PG-in; HK-H6CPE-in; HK-H9RE-in; HK-S1ID-in; HK-S7ID-in;
HK-S10MA-in; HK-S11IN-fgi; HK-S13ID-fgi
R42= HK-H9RE-in; HK-S4ID-in; HK-S7ID-in; HK-S8MAIDIN-fgi
R43= HK-H2CPE-in; HK-H7INT-in; HK-H9PG-in; HK-H9MBA-in;
HK-H10INT-in; HK-S4ID-in; HK-S6MA-in; HK-S7ID-in; HK-S8MAIDIN-fgi;
HKS10MA-in; HK-S11IN-fgi; HK-S12MA-fgi; HK-S13ID-fgi; HK-S15O-fgi;
HK-S16IN-fgi; HK-G3-mq; HK-G5-in
R44= HK-H1RE-in; HK-H2CPE-in; HK-H10INT-in; HK-S3O-fgi; HK-G3-mq;
HK-S15O-fgi; HK-G1-in
R45= HK-H9PG-in; HK-H9MBA-in; HK-H9RE-in; HK-S1ID-in; HK-S4ID-in;
HK-S6MA-in; HK-S8MAIDIN-fgi; HK-S12MA-fgi; HK-S13ID-fgi; HK-S16IN-fgi;
HK-G3-mq; HK-G5-in
R46= HK-H9RE-in; HK-H10INT-in; HK-S1ID-in; HK-S4ID-in; HK-S5MA-fgi;
HK-S10MA-in; HK-S12MA-in; HK-S13ID-fgi; HK-S15O-fgi; HK-S16IN-fgi
R47= HK-H6CPE-in; HK-H9RE-in;HK-S3O-fgi
R48= HK-H1MBA-in; HK-H7INT-in; HK-H7CPE-in; HK-H9PG-in;
HK-H10INT-in
R49= HK-H9RE-in
R50= HK-S1ID-in; HK-G3-mq
R51= IN-HKH-in
R52= HK-H2EX-in; HK-H4RE-in; HK-H6INT-in; HK-H6CPE-in; HK-H7INT-in;
HK-H9MBA-in; HK-S1ID-in; HK-S11IN-fgi; HK-G1-in
R53= HK-H2EX-in; HK-H6CPE-in; HK-S12MA-fgi; HK-S15O-fgi; HK-G5-in
R54= HK-H2EX-in; HK-H5PG-in; HK-H9RE-in; HK-S2IN-fgi; HK-S3O-fgi;
HK-S7ID-in; HK-S11IN-fgi
R55= HK-S2IN-fgi; HK-S6MA-in; HK-H7INT-in; HK-S8MAIDIN-fgi
R56= HK-H1RE-in; HK-H1MBA-in; HK-H2CPE-in; HK-H4RE-in; HK-H5PG-in
R57= HK-H2RO-in; HK-H2CPE-in; HK-H2EX-in; HK-H4RE-in
R58= HK-H1RE-in; HK-H2EX-in HK-H3RE-in; HK-G1-in
R59= HK-H2RO-in; HK-H3RE-in; HK-S1ID-in
R60= HK-H1PG-inp; HK-H2EX-in; HK-H2CPE-in; HK-H5PG-in; HK-H6INT-in;
HK-H7INT-in; HK-H10INT-in
R61= HK-H2CPE-in; HK-H5INT-in; HK-H9RE-in; HK-G3-mq; HK-G5-in
R62= HK-G4-in

R63= HK-H1RE-in; HK-H3RE-in HK-S1ID-in; HK-S5MA-in; HK-S11IN-in;
HK-G4-in
R64= HK-H1PG-inp; HK-H9MBA-in; HK-S2IN-fgi; HK-S6MA-in;
HK-S8MAIDIN-fgi; HK-S15O-fgi
R65= HK-H2RO-in; HK-H5PG-in; HK-H5INT-in; HK-H6INT-in; HK-S3O-fgi;
HK-S5MA-fgi; HK-S6MA-in; HK-S10MA-in; HK-S11IN-fgi; HK-S12MA-fgi;
HK-S13ID-fgi
R66= HK-H2EX-in; HK-H3RE-in; HK-H6RE-in; HK-S4ID-in; HK-S5MA-fgi;
HK-S6MA-in; HK-S7ID-in; HK-S8MAIDIN-fgi; HK-S11IN-fgi
R67= HK-H3RE-in; HK-S5MA-in HK-S6MA-in; HK-S6MA-in;
HK-S8MAIDIN-fgi; HK-S12MA-fgi; HK-S13ID-fgi
R68= HK-H3RE-in; HK-S5MA-fgi; HK-S6MA-in; HK-S15O-fgi; HK-G4-in
R69= HK-H2CPE-in; HK-S7ID-in; HK-S15O-fgi
R70= HK-H2CPE-in; HK-H5PG-in
R71= HK-IN-E1-in