

## FACILITATING THE GROWTH OF THE EDUCATION INDUSTRY

### 1 INTRODUCTION

1.1 This paper reviews the strategic measures to be put in place, so as to build a 'greenhouse' business environment to facilitate the growth of the education industry in Singapore.

1.2 Specifically, this paper reviews 5 key areas – quality issues, student visa issues, manpower issues, land and space, and overseas promotion – in terms of the problems faced by educational services providers and recommendations on how to overcome these problems.

1.3 While the recommendations would apply to all the segments of growth as identified by the Education Workgroup, the segment that would benefit most from the proposed changes are the private commercial and specialty schools. This is because these private schools are currently handicapped by a whole string of problems, from quality issues (from both supply and demand perspectives) to difficulties to securing student passes for international students. By tackling the developmental hurdles and leveling the playing field between the public and private schools in Singapore, the private schools can grow in terms of quality and number of providers. Eventually, these private schools could be the key driver in attracting substantive numbers of full-fee paying international students as well as an established secondary market for learning opportunities to complement the public schooling system.

### 2 ISSUES FACED

#### 2.1 Quality

2.1.1 Private schools – Currently, all private schools in Singapore are required to register with MOE. The regulatory requirements are fairly basic, e.g. every school is required to appoint a Committee of Management to ensure compliance with existing regulations, the school has to declare the proposed course offerings and register its teachers, and the school must have at least 2 classrooms and office/administration space.

2.1.2 Currently, private schools in Singapore are allowed to offer in-house programs up to the Diploma level. To have a complete range of programs up to the undergraduate and post-graduate levels, many of the private schools partner with overseas educational institutions (particularly universities from the Australia, U.K. and the U.S.) to offer 'distance education programs'.

2.1.3 As far as the private schools are concerned, Singapore does not have a central authority that accords recognition to qualifications and courses of study. The MOE is not an accreditation authority on qualifications. Recognition or acceptance of certifications awarded by private schools is entirely at the discretion of the prospective employers. Similarly, there is no mechanism to help consumers assess before purchase the quality or even the credibility of courses offered by the different private schools.

2.1.4 While the public schools (from primary to tertiary levels) are governed by MOE's quality assurance and standards, there is no equivalent system applicable to the private schools. This issue should be reviewed, insofar as quality of private providers is key to safeguarding Singapore's long-term reputation as an education hub.

## 2.2 Student Visas

2.2.1 A friendly and hassle-free application procedure for student pass is a critical success factor in the development of education as a business in Singapore. It is noted that most problems with student pass applications are faced by international students applying to study in private schools.

2.2.2 Tedious process – Many applicants raise questions about the necessity of the many supporting documents required by Singapore Immigration and Registration (SIR) as part of the application process. For example, some applicants find it difficult to produce the original marriage/divorce/death certificates that are deemed necessary for any application. Applicants are unclear why they need to provide education certificates from their parents and/or spouse (including income tax assessment for past 3 years and CPF statements if spouse or parents are Singapore citizens or PRs). Comments have been that the process could be streamlined and that the application approval process could be more clearly explained.

2.2.3 PRC applicants – The application process differs for PRC applicants and they are required to apply in person through the Singapore embassy at Beijing. Many have found this to be rather tedious and inconvenient because applicants living outside of Beijing have to travel the distance to complete the forms. They then have to return to the embassy at their next visit for a compulsory interview.

2.2.4 Work restrictions – The student passes issued by SIR do not allow the students at private schools to work. The policy is different for the IHLs (Universities and Polytechnics) where international students are allowed to work part-time during the school term and full-time during the vacation. The responsibility to approve such work requirements is decentralized to the public schools' Student Affair Offices. Conversely, students in the private schools have to obtain permission from the Controller of Immigration.

2.2.5 Visa duration – In some cases, SIR grants student passes for a fixed calendar duration (e.g. 6 months or 1 year) rather than for the full-course duration, especially for international students in the private schools. Such students are then required to submit their renewal applications about 2 weeks before the expiry of their current student passes. This generates much uncertainty for the students, and creates the perception that they are 'second class' as compared to their peers in the public schools. Many private schools have commented that the renewal process could be rather tedious and that students would much appreciate to be granted student pass for the full duration of their course.

2.2.6 Lack of transparency – SIR does not explicitly state the assessment factors that lead to the approval of a student pass. This makes it difficult for applicants to understand the requirements for studying in Singapore. It also leads to questions about the

necessary supporting documents needed for an application. In all, the system is not user friendly.

## **2.3 Manpower**

2.3.1 Shortage of quality teachers – With increasing number of students, there will be an increasing demand for teachers. The National Institute of Education (NIE) is the only teaching training institute in Singapore and is responsible for the training of teachers for up to pre-university education in the public schools. While NIE has been approached by some private schools to offer training courses to their trainers, NIE explained that they would not be allowed to cater to the training needs of teachers outside of the stipulated group. Furthermore, NIE's resources are committed towards training of teachers for the public schools.

2.3.2 Situation in private schools – The private schools are currently required to register all their teachers with MOE. MOE states that such teachers should, in general, have at least 5 GCE 'O' level credits and other relevant qualifications (related to the subject areas to be taught) beyond the levels that they are proposed to teach. However, it is observed that teacher quality varies greatly across the private schools with most teachers employed on a part-time basis.

## **2.4 Land and Space**

2.4.1 Land cost is a major cost component for education institutions that require an independent campus. Many private schools, particularly the non-profit institutions, may not be able to afford commercially priced land.

2.4.2 To enhance the experience of studying in Singapore and ensure a minimum standard in terms of environmental factors, a purpose built campus is needed. Ideally, this could be located where there are good supporting services and amenities e.g. public libraries, sports facilities, public transport, retail, food, etc. This will also help facilitate the creation of institutions, attractive to local and foreign students and therefore with long term viability.

2.4.3 The quality of commercial schools' facilities is very uneven and there is a general perception that the average level of quality is quite low. There is also some duplication of facilities and resources amongst these schools.

2.4.4 Another potential bottleneck is the availability of sufficient good quality housing for international students. This is especially so for those students who study in the private commercial schools – they rely very much on personal housing and accommodation arrangements because most of the commercial schools do not operate hostels. There have been a few cases of international students who have been cheated by unscrupulous housing providers, which may indicate a need to introduce better market information and matching mechanisms.

## **2.5 Overseas Education Promotion**

2.5.1 Currently, there is no central agency to co-ordinate the overseas promotion of Singapore as an educational destination for international students. The MOE schools (including the public universities) conduct their own recruitment campaigns while the private schools make use of overseas agents or direct marketing to recruit students.

2.5.2 95% of private schools in Singapore have less than S\$5m in annual revenue (Source: IE Singapore). Such schools do not have the resources to conduct their own marketing overseas, and are highly dependent on third-party recruitment agents. Anecdotal accounts abound of 'hard sell' or misrepresentative tactics adopted by the mostly for-profit agents. This results in a highly fragmented approach to marketing Singapore's education. There is no government or quasi-government agency to oversee these overseas promotional efforts, let alone ensure that there is no misleading advertising involved.

2.5.3 The downside of the existing state of affairs is the variability in terms of how Singapore's attractiveness as an educational destination is perceived. In the three key global education markets of Australia, U.K. and U.S., the governments are directly or indirectly involved in the promotion efforts. This helps in maintaining the countries' reputations as education hubs.

### **3 RECOMMENDATIONS**

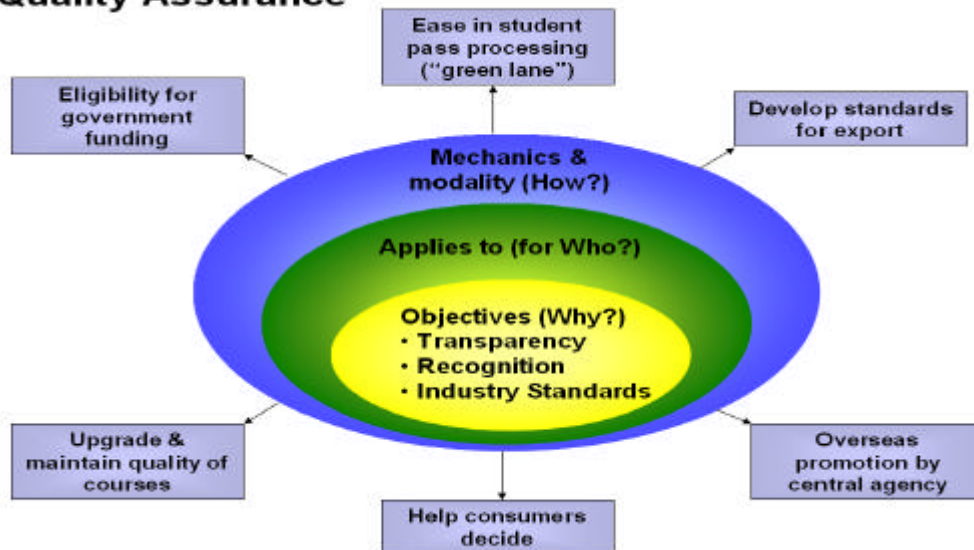
Having highlighted the key issues and challenges faced by the education service providers in Singapore, what follows are recommendations pertaining to each set of issues.

#### **3.1 Quality Assurance (QA) Framework for Private Schools**

3.1.1 A QA system is critical to upgrading the industry, particularly for the private schools. The proposed standards and QA requirements would be over and above the regulatory requirements laid down by MOE.

3.1.2 A proposed framework is as follows:

## Quality Assurance



3.1.3 This proposed QA system has three objectives:

- *Establish clear industry standards* – So that the private schools have a uniform set of indicators on which to focus their self-improvement efforts. The system could incorporate peer reviews, so that the schools are able to adopt best practices from one another.
- *Establish a public recognition process* – So that the better schools are able to differentiate their services. The QA framework could be spelt out by the Government, while the actual QA processes could be private sector driven.
- *Establish market transparency* – So that consumers can use the QA system as an indicator that the school has met a certain level of quality in its educational processes. The better schools would be able to leverage on their QA approval status as a differentiating factor when marketing to foreign students.

3.1.4 The QA system should cover the following:

- *Standards for teachers* – In terms of qualifications, training and relevant experience.
- *Standards for curriculum, pedagogy and study materials* – These should be evaluated by educational experts, and should conform to international standards.
- *Standards for facilities* – These should take into cognizance the types of programs offered, so as to provide adequate support to students.

- *Standards for management and corporate governance* – This would include whether the school has a proper structure cum qualified team to provide sound leadership and corporate oversight.
- *Standards for disclosure* – This is to ensure that students are aware of the school's advantages, characteristics and limitations prior to purchase. The disclosure should include provision of information about the schools (e.g. paid-up capital, availability of resources, who are the owners, etc); student profile (e.g. demographics and academic standards); and graduation information (e.g. percentage of graduation, employability of graduates and availability of alumni networks).

**3.1.5 The proposed QA system would not be a full-fledged university-level accreditation system.** Presently, there is no need for such a university accreditation system because the private schools are not allowed to offer their own degree programs, while the foreign university programs are already accredited in their country of origin. As for the public universities, they already have their own quality assurance mechanisms. It does not make economic sense to introduce any form of accreditation system for the local universities, until a time when there are more indigenous degree providers in the market.

**3.1.6 Proposed mechanism** – Feedback from several private schools is that many of them would welcome a QA system to upgrade the industry. The Education Workgroup is of the view that **a public-private partnership would be the most effective mechanism in kickstarting this initiative.** Specifically, the Government's role would be to map out the overall generic QA framework, and facilitate the setting up of the actual policies and practices. The private sector's role would be to provide inputs on the structure of the QA system, identify key performance indicators for the specialised sub-divisions within the private schools umbrella, and implement the actual QA processes. The actual assessment processes could include self-assessment, peer reviews and external audits. **At steady state, the QA system should be industry driven,** e.g. there could be an impartial private entity that would refine the QA criteria, work with the private schools in implementing the QA standards, and monitor compliance. The QA system should be voluntary in nature. Once it has been proven to benefit the schools, there should be wide-scale adoption.

**3.1.7 Path forward** – There is no need to reinvent the wheel by developing a QA system from scratch. Instead, **one possibility is to adapt from existing quality standards, e.g. customizing the Singapore Quality Award managed by SPRING Singapore,** just as the U.S. National Institute of Standards and Technology has customized the Malcolm Baldrige Award for educational institutions. The Workgroup believes that **the SQA is a good starting point because the business excellence model underpinning the award is comprehensive (e.g. it covers elements from leadership to innovation) and is based on internationally accepted standards.** To implement this, the Workgroup would recommend the initiation of a working committee, comprising representatives from EDB, SPRING Singapore and selected private schools to scope out and flesh out the QA system, ownership and operation. Once the system is developed, a few private schools could 'test pilot' the standards. Subsequently, after the system has been fine tuned, it could be rolled out to all private schools.

## 3.2 Student Visa Recommendations

3.2.1 International Comparison – Annex 1 summarizes the requirements and details of the student pass application procedure in US, Australia, UK and Malaysia (these are major educational destinations for international students). Some notable observations on the visa policies and procedures in these countries are:

- *Availability of different categories of student visas.*
  - Australia has 7 subclasses of student passes.
  - US has 4 different visa types for potential students.
  - UK offers prospective students a special student pass valid for up to 6 months to visit and scout for the right school in UK.
- *Clear communication of the factors of consideration for student pass approval.*
- *Existing Quality Assurance Agencies that help determine the quality of schools.*
  - US, UK and Australia have accreditation bodies that rank the quality of schools (IHLs and smaller private schools) within the country.
- *Granted permission to work with certain restrictions.*
  - US, UK and Australia student pass applicants may be granted approval to work (with limitations on number of working hours, usually during term time).

It is observed that current immigration procedures for international students in Singapore are not as sophisticated and developed as those in the US and Australia. The latter countries have in place a system to help segment the schools into various risk categories. The segmentation helps immigration officers identify the areas where there might be a higher incidence of abuse cases (areas where they would need to apply more stringent checks and verifications). All the countries compared also have Quality Assurance Agencies that help immigration officers differentiate the quality of schools.

3.2.2. Streamline the process – Review the need for all current supporting documents required. Propose that SIR requests only for documents needed to assess the particular case.

3.2.3 Varied assessment level and categories of student pass – The Australian authority has varied assessment levels for student pass applicant. The assessment level is determined based on objective data regarding compliance from students of different nationalities in different education sectors. The assessment level is made known to the student applicant. It is recommended that SIR studies the possibility of introducing a system of varied assessment levels for student pass applicants. The determining factors could be school, applicant nationality, education sector etc. and should be decided by analysing objective data regarding compliance with SIR rules. **Such a system would help ensure a smooth and fast process for applicants from a lower risk profile and a more stringent and thorough check for applicants from a higher risk profile.** Letting students and education providers know their assessment level would also

increase the transparency of the application procedure. Students and education providers would then be better able to understand the criteria that have to be met in order to prove their intention to study.

3.2.4 Transparency – SIR should list the key factors of consideration for the approval of student pass applications. This would help students and education providers understand the criteria that have to be met in order to present their intention to study. With clear guidelines and proper communication, a self-regulating system (e.g. demerit points for non-compliance and favourable assessment levels for compliance) could be put in place where education providers will strive to ensure high levels of compliance among their student pass applicants.

3.2.5 Permission to work – SIR to consider allowing all student pass holders (including those studying in private schools) to work, in line with international practice. SIR can apply similar restrictions (e.g. limited working hours) to such students, to ensure that student passes would not be used as a backdoor to illegal lucrative employment in Singapore. In addition, there should be some flexibility in facilitating student internships, as this would enhance the value of an education in Singapore, and could be a good source of attracting foreign talent to work in Singapore.

3.2.6 Visa for full-course duration – With a reliable application assessment procedure in place, SIR should consider approving student passes for the full duration of the course.

3.2.7 Integration with quality assurance system – The proposed quality assurance system would help SIR determine the quality of schools that students are applying to, and thus be better able to assess the quality of the student applicants.

3.2.8 Path forward – The Workgroup recognizes that a comprehensive review of the student pass policies and systems would require some time to complete. **The guiding principle would be the need to develop a more sophisticated and segmented student pass system, to meet the needs of the different market segments. To help the local private schools compete regionally, the Workgroup recommends a two-stage approach, as follows:**

- *Short term measures (can be implemented within 6 months)* – The relevant authorities to consider expediting the processing of student passes for postgraduate and undergraduate courses at the private schools, i.e. to follow the system adopted for the MOE schools and public universities. The rationale is that these would be serious students who plan to be in Singapore for at least 2 years or more, and are less likely to commit immigration offences.
- *Long term measures (can be implemented within the next year to two years)* – The relevant authorities to review the student pass policies and practices on a systemic basis, taking into consideration the recommendations and pointers in paragraphs 3.2.1 to 3.2.7. However, the integration with the proposed quality assurance system may take more time.

### 3.3 Recommendations on Manpower

3.3.1 Continuous Learning Courses – As an immediate solution to address teacher shortages, one possibility is for NIE to offer foundation and Continuous Education Training (CET) courses to teachers of private education providers to help upgrade the quality of teaching, or partner quality private school providers to administer such courses. However, the Workgroup acknowledges that NIE's primary focus is to train teachers for the national schools, and it might not have the capacity to take on this role.

3.3.2 Introduce more teacher training institutes – Encourage the set up of quality teacher training institutes to offer foundation and CET courses to the public and current private commercial school teachers. These training institutes could be branch campuses of reputable teacher training institutions from overseas.

3.3.3 Access to funds for upgrading of teachers – Allow private education providers to tap on the Skills Development Fund, Lifelong Learning Fund or related funds for the development of their teachers. A special grant could be introduced to subsidize and encourage private education providers to send their teachers for training and certification.

### 3.4 Land and Space Recommendations

3.4.1 Institutional land pricing for private universities and preparatory & boarding schools that require campuses. The land parcels would be used for educational and support facilities, e.g. classrooms, lecture halls, sports facilities and student housing. **Assuming that over the next 10 years, there would be 2 additional full campus private universities, 10 smaller tertiary institutions (similar to INSEAD) and 10 private preparatory & boarding schools, the Workgroup estimates that 90 ha of land needs to be set aside at institutional land pricing. The notional cost for reserving 90 ha of land – based on the differential in land premiums between zoning as commercial land and zoning as institutional land – is estimated at S\$38.2m per year.** Possible locations (particularly for the full campus universities and the preparatory & boarding schools) include HDB town areas in the northern parts of Singapore. This will help balance the concentration of education institutions in the south and south-western parts of Singapore.

3.4.2 The education profile of Singapore could be boosted by creating an icon project i.e. concentrate the best commercial schools, specialty schools, corporate training institutes and companies in one location, ideally by industry type. This would promote collaboration and could be a magnet for high quality students who will in turn raise the profile of the schools in a virtuous cycle. This concept would help to differentiate Singapore from other popular education destinations.

3.4.3 To reduce duplication of resources and to lower overhead costs amongst a group of like-minded education services providers, shared facilities for corporate training centres, commercial and specialty schools can be explored. One suggestion is an 'Edumall' concept where the schools have shared classroom and other study facilities. This could be private sector-led. The 'Edumall' need not be a standalone building, instead, it could be incorporated into a mixed use development (like JTC's Paya Lebar iPark for commercial, retail, light industrial activities) or into the one-north zone.

3.4.4 To preempt the potential housing crunch in the future, the following could be adopted:

- JTC could consider making available the SHiFT (Scheme for Housing of Foreign Talent) apartments to international students, while HDB could consider relaxing the rules on subletting of flats. These measures would increase the supply of accommodation available in the market.
- At the same time, the proposed EPA (Education Promotion Agency) could provide information about the various housing options in Singapore, advise on what to look out for when sourcing for housing, and provide links and referrals to housing providers. For instance, HDB dwellers who wish to sublet their flats can register with the HDB Branch Offices, and the database could then feed into the EPA's information clearinghouse.

### 3.5 Recommendations on Overseas Promotion

3.5.1 International Comparison – Annex 2 gives an overview of the approaches undertaken by Australia, U.K. and U.S. in co-ordinating the overseas education promotional efforts. For all three countries, there is a central agency to undertake or oversee the promotional efforts. The agencies receive government funding. Student attraction is one of a suite of related services offered by each agency.

3.5.2 It is recommended that a central agency be set up in Singapore to co-ordinate and spearhead efforts to promote Singapore as an education destination. That is, the agency would focus on the consumer market, to attract full-fee paying international students to study in Singapore at all levels of education. This would complement existing efforts in attracting reputable international educational institutions to set up in Singapore.

3.5.3 Specifically, this education promotion agency (EPA) would have the following roles:

- Promote and position Singapore as an education destination of choice, i.e. this would be a strategic marketing role.
- Provide impartial information about the registered education service providers in Singapore. For the private schools, the eventual goal would be to promote only the schools that meet the QA system's standards.
- Provide advisory and facilitation services to international students who are keen to study in Singapore.
- Promote the placement of graduates in their home countries, e.g. establishing linkages with companies, creating a job database, and organizing of job fairs. This is important because one key ingredient of a degree's value is the employability of the graduates.

3.5.4 Modality of operation – In short, the proposed agency has a broad strategic marketing role, coupled with a more tactical cum operational role. The EPA could be an independent non-profit agency, funded by government grants and fees for services rendered. (Additional research needs to be done on whether the private schools would be willing to pay service fees to the EPA for marketing for their behalf.) Another alternative could be for an existing government agency to undertake the EPA's roles. This could leverage on existing resources or networks, without having to incur substantial setup and recurring expenses in maintaining overseas offices. **Based on a preliminary review of existing agencies' responsibilities, the most appropriate body to undertake EPA duties would be Contact Singapore.** This is because Contact Singapore has an international network that focuses on attracting foreign talent to work in Singapore. The proposed EPA objectives would be a complementary extension of Contact Singapore's existing mandate.

3.5.5 Path forward – It is recommended that MOM, MOE, IE Singapore and EDB – these government agencies are directly or indirectly involved in attraction of international students – set up a working committee to look into how best to implement the EPA concept. At the same time, the Education Workgroup acknowledges that other Workgroups within the Services Sub-Committee may be recommending promotional agencies for their respective industries as well. Thus, there may be a need to rationalize how these promotional efforts could be integrated.

## 4 CONCLUSION

4.1 The focus of this paper has been on proposing recommendations that would level the playing field between the public and private sector education service providers. Currently, the public and private sectors account for 81% and 19% respectively of the education industry's contribution to GDP. As the public sector's focus is and would remain on manpower training and capability development, the strategic intent of attracting full-fee paying international students to grow the education industry would fall onto the private sector's shoulders. As such, it is imperative to address the developmental hurdles faced by private schools, so as to facilitate their growth, particularly the Promising Local Enterprises (PLEs).

4.2 The end goal could be a 50-50 split between the public and private institutions in terms of economic contribution. The proposed changes need to be implemented quickly, otherwise the education industry could face hollowing out, in terms of international students going to other countries or in terms of our private schools bringing their foreign university partners with them into JVs in the emerging markets (like China). Furthermore, the regional countries (including Australia and Malaysia) are ramping up efforts to attract international students. The proposed changes would create a pro-enterprise greenhouse, such that new and existing private schools are able to anchor and grow their Singapore-based operations.

## ANNEX 1

## INTERNATIONAL COMPARISON OF STUDENT PASS APPLICATION PROCEDURES

	<b>Singapore</b>	<b>United States</b>	<b>Australia</b>	<b>United Kingdom</b>	<b>Malaysia</b>
<b>Where to apply</b>	In Singapore, at the SIR Building  <i>Exception for PRC Applicants (for private schools)</i> PRC applicants must apply in person at the Singapore embassy at Beijing.	US Embassy located in the home country  While prospective students can apply in the US, it would be harder to obtain approval	Australian Embassy located in the home country	UK Embassy located in the home country	All student pass applications are handled by the Malaysian Institution of Higher Learning in M'sia.  <i>PRC Applicants</i> PRC nationals have to obtain entry visas from the M'sian Embassy in Beijing, Guangzhou or Shanghai.
<b>Requirements</b>	<ul style="list-style-type: none"> <li>- Full-time studies with an institution that is registered with MOE, or has obtained approval from Director of SIR to accept foreign students.</li> <li>- Local sponsor (who must be Singapore citizen or PR)</li> </ul>	<ul style="list-style-type: none"> <li>- Financial ability</li> <li>- English proficiency</li> <li>- Health (no communicable or psychological disease)</li> <li>- Demonstrate the intention not to be an immigrant of US</li> </ul>	<ul style="list-style-type: none"> <li>- Financial ability</li> <li>- English proficiency</li> <li>- Health</li> <li>- Character</li> <li>- Appropriate Health Insurance</li> <li>- Under 18: proof of proper accommodation and general welfare arrangements</li> <li>- With school age children: applicant must register children in appropriate school in Australia</li> </ul>	<ul style="list-style-type: none"> <li>- Accepted into course of study at public university/college, or a bona fide private institution or a fee paying independent school.</li> <li>- Course to total 15 or more hours/week</li> <li>- Letter from school stating that deposit/tuition fees have been paid</li> <li>- Financial ability</li> <li>- Demonstrate intention to leave the UK after end of studies</li> </ul>	Information not available
<b>Interview</b>	Required for PRC applicants	Required for 1 <sup>st</sup> time applicants	No, unless deemed necessary	No, unless deemed necessary	No, unless deemed necessary
<b>Fees &amp;</b>	<i>Visa Processing Fees</i>	<i>Visa Processing Fees</i>	<i>Visa Processing Fees</i>	<i>Visa Processing Fees</i>	<i>Visa Processing Fees</i>

	<b>Singapore</b>	<b>United States</b>	<b>Australia</b>	<b>United Kingdom</b>	<b>Malaysia</b>
<b>Security Deposit</b>	<ul style="list-style-type: none"> <li>- S\$40/yr and issue fee of S\$20</li> <li>- Free for applicants applying to study in Government schools.</li> </ul> <p><u>Security Deposits</u> Varies with nationality:</p> <ul style="list-style-type: none"> <li>- <b>S\$1,000</b> for Indonesia, Philippines &amp; Thailand</li> <li>- <b>S\$5,000</b> for Bangladesh, Myanmar, PRC, India</li> <li>- <b>S\$1,500</b> for all others</li> </ul> <p>Malaysians and Brunei nationals, int'l students studying at Foreign Systems schools &amp; Kindergartens, Government Schools and IHLs (Universities and Polytechnics) are not required to pay security deposits</p>	US\$45 for application	<p>A\$290</p> <p>Additional A\$50 for Student Pass with work permission</p> <p>Additional A\$125 for change of education provider</p>	GBP 33 for single entry into UK	<p>Entry visa processing fee ranges from RM 7 to RM 100</p> <p>In addition, the student pass costs RM60 per year</p> <p><u>Security Bonds</u> Varies with nationality: RM 200 (Singapore) – RM 2,000 (United States &amp; Canada)</p>

	Singapore	United States	Australia	United Kingdom	Malaysia
<b>Assessment Factors</b>	<p>- <b>School</b> - <b>Nationality of applicant</b></p> <p><i>E.g. School Level</i> No security deposit required for IHLs, Foreign System Schools, Kindergartens, and Government Schools</p> <p>Faster processing time for IHLs and Government Schools.</p> <p><i>E.g. Nationality</i> PRC applicants have stricter requirements including higher security deposit, compulsory interview etc.</p>	<p>- <b>School</b> - <b>Nationality of applicant</b></p> <p>Existing <u>Quality Assurance Agencies</u> helps consular office determine which are quality schools</p> <p>Checks at applicant and school level, to whether any cases of forgery or act against rule (e.g. accepting student with forged documents) have occurred before</p>	<p>- <b>Education Sector</b> - <b>Nationality of applicant</b></p> <p><u>5 different assessment levels</u> (1: least strict to 5: most strict)</p> <p>Assessment level is determined based on objective data regarding compliance of students from different countries and different education sectors</p>	<p>- <b>School</b> - <b>Nationality of applicant</b></p> <p>Existing <u>Quality Assurance Agencies</u> helps consular office determine which are quality schools</p> <p><i>E.g. Nationality</i> <b>EU nations/Ireland/Norway:</b> free to enter UK to study, live or work</p> <p><b>Non-visa nationals</b> (nationals who do not require visa to enter Britain): Can be issued visa upon arrival (though encouraged to apply before entering UK)</p> <p><b>Visa nationals :</b> To apply at British Embassy of home country and should be accepted at a reputable UK college or university, or at an accredited language school</p>	Information not available

	<b>Singapore</b>	<b>United States</b>	<b>Australia</b>	<b>United Kingdom</b>	<b>Malaysia</b>
<b>Time taken</b>	<b>3 days</b> (Government Schools and IHLs) <b>to 4 weeks</b> (Private Schools, Foreign System Schools, Kindergartens). Some cases may take longer	No specific period. To apply several weeks ahead but no more than 90 days before	Did not state, dependent on complication of applications	<b>24 hours to 10 working days.</b> Some cases may take longer	<b>2 weeks</b> to inform student applicant  Upon arrival: 2 weeks to get Student Pass sticker on passport
<b>Duration of visa awarded</b>	Generally full period for course of study in Government schools and IHLs  Shorter period of study for private schools .	Generally full period for course of study (applicable for visas F-1, J-1, M)	Dependent on subclass of assessment	Normally for full period of study	Visa valid for 1 year of study, to be renewed for longer course durations

	Singapore	United States	Australia	United Kingdom	Malaysia
<b>Different Categories for Student Passes</b>	Nil	<p><b>4 Possible Categories:</b></p> <p><b>'J' visa</b> for exchanges of persons, knowledge and skills in the fields of education, arts and sciences</p> <p><b>'Q' visa</b> for international cultural exchange programme for the purpose of providing practical training, employment and sharing of history, culture and traditions of participant's home country</p> <p><b>'F' visa</b> for academic studies</p> <p><b>'M' visa</b> for nonacademic or vocational studies</p>	<p><b>7 subclasses:</b></p> <ol style="list-style-type: none"> <li>1) English Language Intensive Course for Overseas Students (ELICOS) and non-award courses.</li> <li>2) Primary and Secondary Schools</li> <li>3) Vocational Education and Training</li> <li>4) Higher Education</li> <li>5) Masters and Doctorate</li> <li>6) Non-award Foundation Studies</li> <li>7) AusAID and Defence (sponsored by Australian government)</li> </ol>	Nil	Nil
<b>Permission to work</b>	<p>No</p> <p><u>Exception:</u> Students in IHLs, Polytechnics are allowed to work part-time during school term and full-time during vacations (subject to approval from the school's student affairs office)</p>	<p>Yes</p> <p><u>Conditions:</u></p> <ul style="list-style-type: none"> <li>- 1<sup>st</sup> year: can <b>only</b> work within school</li> <li>- After 1<sup>st</sup> year: can work outside of school (approval given by INS)</li> </ul>	<p>Yes</p> <p><u>Conditions:</u></p> <ul style="list-style-type: none"> <li>- Permission will not be given with initial student visa granted</li> <li>- Applicants must reapply for Student Pass with work permit only after they have commenced their studies in Australia</li> </ul>	<p>Yes</p> <p><u>Conditions:</u></p> <ul style="list-style-type: none"> <li>- Can work up to 20 hours during study sessions</li> <li>- Up to 40 hours during vacations</li> </ul>	Information not available.

## ANNEX 2

## COMPARISON OF OVERSEAS EDUCATION PROMOTION

	<b>Australia</b>	<b>United Kingdom</b>	<b>United States</b>
<b>Agency responsible for promoting education to international students</b>	IDP Education Australia	British Council	US Department of State – Educational Information and Resources Branch
<b>Objectives</b>	To inform and advise international students on Australian education and assist in enrolment within Australian institutions	To facilitate cultural exchange between the UK and other countries, particularly in the area of education and training	To provide information on the U.S. higher education system and study opportunities to prospective students and scholars
<b>Services offered by overseas centres</b>	<ul style="list-style-type: none"> <li>• Provides information about studying in Australia and choice of educational institutions in Australia</li> <li>• Provides developmental consultancy services to governments and communities globally</li> <li>• Provides assessment and evaluation services (including English language training)</li> <li>• Conducts research on education trends</li> <li>• Facilitates employment of international graduates</li> </ul>	<ul style="list-style-type: none"> <li>• Advises on opportunities to study in the UK and provides support to international students. The Council also runs a number of international programs for UK school, college and university students</li> <li>• Provides varying levels of support to Higher Education Institutions seeking to promote distance learning courses outside the UK</li> <li>• Examination Services Division helps international organizations to market their examinations overseas</li> </ul>	<ul style="list-style-type: none"> <li>• Centres provide information on all accredited institutions of higher learning in the U.S.</li> <li>• Centres provide advisory services to international students</li> </ul>

	<b>Australia</b>	<b>United Kingdom</b>	<b>United States</b>
<b>Modality of operation</b>	<p>Originally started as an international educational aid agency, IDP now has 63 offices in more than 30 countries</p> <p>IDP is currently owned by 37 Australian universities, and receives government funding for some of its schemes</p>	<p>Operates in 227 cities in 109 countries</p> <p>The Foreign and Commonwealth Office provides the British Council with an annual grant. The Council also receives income from other UK government departments and agencies and from international bodies and increasingly from the private sector. The rest of the revenue, amounting to 40 per cent of the total, is earned from selling services such as project management, UK-based training, English language courses and examinations</p>	<p>Department of State provides financial support to approximately 450 education information / advising centres located around the world</p> <p>The centres are operated independently, but have to conform to the Department of State's guidelines and ethical practice</p>