



Ten Years On: Satisfying Hong Kong's Demand for Higher Education

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Ten Years On

Satisfying Hong Kong's Demand for Higher Education

Abstract

At present, 14,500 first-year, first-degree places are available in institutions funded by the [University Grants Committee], equivalent to about 18 per cent of the relevant age group of 17 to 20. For the 2005-06 academic year, UGC-funded institutions have also provided an additional 840 senior year places for graduates of sub-degree programmes and people with other qualifications. A further 48 per cent of people in the same age group were given access to other local or overseas higher education opportunities (for example, sub-degree programmes, vocational training, and overseas university programmes). The overall post-secondary participation rate for the 17 to 20 age group increased from 33 per cent in the 2000-01 academic year to 66 per cent in the 2005-06 academic year.

Hong Kong Yearbook 2005¹

What makes up the 66%? Specifically, what makes up the 48% between 18% and 66%? How do the figures compare with Singapore, where there appears to be aggregate supply equivalent to at least 50% of 18 year olds?

With post-secondary places supplied for 66% of 18 year olds in Hong Kong, and for more than 50% in Singapore, against a 2004 Organisation for Economic Cooperation and Development average of 53%, should we conclude that neither market will grow further, that both markets are mature and saturated? Is this true only of higher education, or are there trends in commencements that suggest growth in other sectors?

What niches are available for Australia, including its share of students from Hong Kong and Singapore studying in Australia or in transnational education? Will the provision of sub degree programmes in Hong Kong lead to increased demand for conversion or top up degrees, as in Singapore?

How will the move to six years of secondary education in Hong Kong affect the size and shape of demand for international education? How will universities in Hong Kong handle the double cohort that will enter university in 2012? How will the move in Hong Kong to four year degrees affect the acceptance in Hong Kong of Australian three year degrees?

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Ten Years On

Satisfying Hong Kong's Demand for Higher Education

Ten years into Chinese rule, ten years ago today since the last British Governor, now Lord Patten, sailed out of Hong Kong, it is still difficult to get into university in Hong Kong.

In the 1980s, fewer than 5% of people had access to university education in Hong Kong. But Lord Wilson, the British Governor before the last Governor, announced plans in 1989 to take the number of first year, first degree university places to 14,500, ensuring university access for 18% of Hong Kong's people².

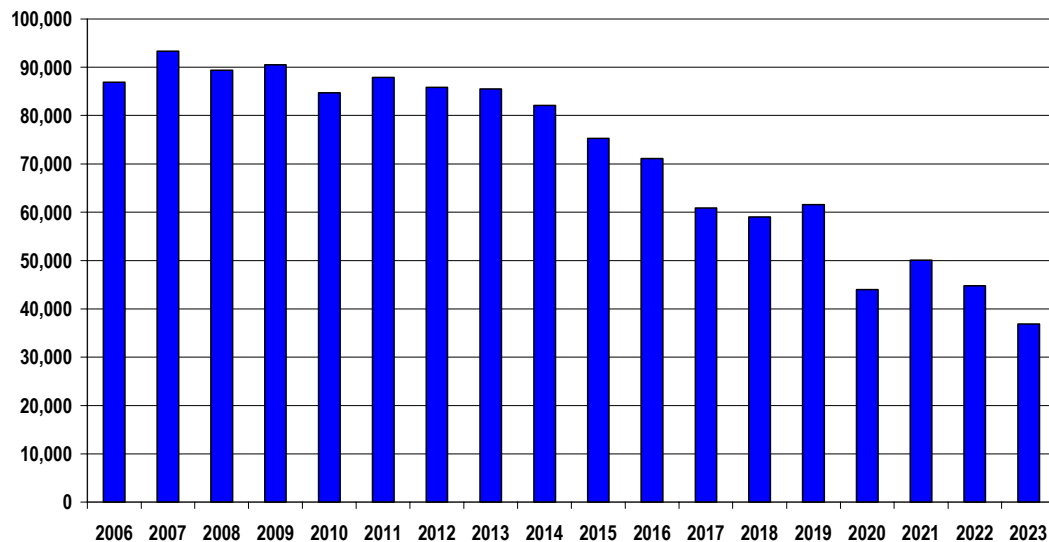
In the early 1990s, there were 82,000 18 year olds in Hong Kong. 14,500 first year, first degree places provided access to nearly 18% of 18 year olds. This was the intent of policy.

Ten Years On

Ten years on from 1997, 2007 is a Dragon Year for students entering university. The 93,300 children born in the Year of the Dragon in 1988 turned 18 in 2006 and are now seeking university places. With 14,500 places, there will be room for just 15.5%.

Chart 1

Number of 18 Year Olds in Hong Kong



Outgoing Education Minister Arthur Li Kwok-cheung, who steps down from his portfolio today, is one who argues that Hong Kong universities are elite, and only the best students benefit from university education.

But Hong Kong's 14,500 new university entrants fail to satisfy the demand of the Hong Kong economy for 26,500 new graduates each year³. And 18%, or 15.5% in 2007, is a long way off the average of 53% in 2004 among the 30 countries in the Organisation for Economic Cooperation and Development⁴.

Access to university will get easier. Birth rates in Hong Kong have fallen. Compared with 93,300 in 1988, there were 61,600 births in the next Dragon Year, 2000. In 2020, just 44,000 18 year olds will compete for 14,500 places, providing access to 33%, against the OECD average of 53% in 2004.

Post-Secondary Education

The first Chief Executive of the Hong Kong Special Administrative Region, Tung Chee-hwa, in his Policy Address in October 2000, set down the objective that within ten years, 60% of senior secondary school leavers will receive tertiary education. Subsequent speeches clarified that the target of 60% within ten years referred to the age participation rate.

From the **Hong Kong Yearbook 2005**⁵

At present, 14,500 first-year, first-degree places are available in institutions funded by the [University Grants Committee], equivalent to about 18 per cent of the relevant age group of 17 to 20. For the 2005-06 academic year, UGC-funded institutions have also provided an additional 840 senior year places for graduates of sub-degree programmes and people with other qualifications. A further 48 per cent of people in the same age group were given access to other local or overseas higher education opportunities (for example, sub-degree programmes, vocational training, and overseas university programmes). The overall post-secondary participation rate for the 17 to 20 age group increased from 33 per cent in the 2000-01 academic year to 66 per cent in the 2005-06 academic year.

What makes up the 66%? Specifically, what makes up the 48% between 18% and 66%?

The point needs to be made that there are problems of transparency. The Education and Manpower Bureau's March 2006 **Review of the Post-Secondary Education Sector**⁶ commented that, for the purpose of monitoring the development of the post-secondary education sector, the Government collects programme information and student/graduate statistics from service providers at least annually.

Hitherto the statistics have been kept mainly for [the] Government's internal reference. Parties consulted generally agree that the Government should release aggregated market information for public consumption to increase market transparency. This will also assist service providers in adjusting to market dynamics.

Recommendation 10: We recommend the release of more information on the development of the post-secondary sector for public consumption to increase market transparency.

Statistics are still hard to find, but there appears to have been massive increase in provision.

From the Education and Manpower Bureau website⁷, 20 institutions in 2006/07 offered a total of 302 full time accredited self-financing post-secondary programmes. These institutions include university subsidiaries such as The University of Hong Kong School of Professional and Continuing Education (HKU SPACE), which in 2005/06 enrolled 111,708 students, equivalent to 18,961 FTE⁸.

From **Review of the Post-Secondary Education Sector**, institutions in Hong Kong provided 49,922 secondary education places to school leavers in 2005/06, 17,352 at Bachelor degree level and 32,570 at sub degree level.

Table 1
Post-Secondary Education Places in Hong Kong 2005/06

Level	Publicly Funded	Self Financing	Total
Bachelor's Degree	14,802	2,550	17,352
Sub Degree	9,576	22,994	32,570
Total	24,378	25,544	49,992

Transnational Education

Under the Non-local Higher and Professional Education (Regulation) Ordinance, all courses conducted in Hong Kong leading to the award of non-local higher academic qualifications or professional qualifications must be registered or be exempted from registration. Courses conducted by non-local providers in collaboration with higher education institutions in Hong Kong can be exempted, all other courses need to be registered.

In total 1,109 courses have been registered or exempted: 410 courses, 46% from UK and 34% from Australia, have been registered and 699 courses, 63% from UK and 21% from Australia, have been exempted.

The Observatory on Borderless Higher Education⁹ surveyed UK institutions in 2004 and concluded that there were 13,928 students in Hong Kong in transnational education programmes from UK universities. IDP Education Australia surveys Australian institutions and reported in 2005 that there were 12,808 students in Hong Kong in transnational education programmes from Australian universities. There are at least 26,700 Hong Kong students in transnational education programmes.

In the absence of any market transparency, we know nothing about the composition of these 26,700 students. Making some bold assumptions

- if one third are postgraduates and two thirds undergraduates
- if undergraduate courses from UK and Australia are three years in duration
- if two thirds of undergraduates are part time and one third full time
- then there are 3,960 commencing undergraduates in transnational education programmes in Hong Kong each year.

Overseas Education

Unmet demand for higher education has created a culture where many Hong Kong students study at universities overseas.

A survey of a sample of households in 2005 by Hong Kong's Census and Statistics Department¹⁰ suggested that 72,800 students were studying higher education outside Hong Kong: 26% in Australia, 24.5% in UK, 18.4% in US and 15.1% in Canada. Of the 72,800, 75.4% were at undergraduate level, 41% were studying Business and 56.2% were men. Reasons for studying outside Hong Kong included: to improve English efficiency, better learning environment outside Hong Kong, better job prospects and to learn to be independent.

These numbers are too high, simply they do not reconcile with numbers reported to be studying in Australia, UK or USA. The Hong Kong survey may include aspirations as well as reality.

From Australian Education International¹¹, 2,580 Hong Kong students commenced undergraduate higher education in Australia in 2006. From the Higher Education Statistics Agency¹², there were 6,810 Hong Kong students in undergraduate university programmes in UK in 2005/06, suggesting 2,270 commencements. From **Open Doors**¹³, there were 5,371 Hong Kong students in undergraduate degree programmes in USA in 2005/06, suggesting 1,343 commencements. Undergraduate intakes of Hong Kong students aggregate to 6,193 students per year in Australia, UK and USA.

These three countries accounted for 69% of provision in the Census and Statistics survey, suggesting that 9,000 Hong Kong students commence undergraduate study overseas each year.

Vocational Education

From the **Hong Kong Yearbook 2005**, the Vocational Training Council was established in 1982 to provide vocational education and training for school leavers and adult learners to acquire skills and knowledge for lifelong learning and enhanced employability.

Altogether, over 160,000 full time and part time places were available for the academic year 2005/06. There is nothing in the public domain that splits these places by school leavers or lifelong learning, by intakes or continuing enrolments, or by entry level (Secondary 3, Secondary 5 or Secondary 7).

We do know from these figures that Hong Kong is well provided for in terms of access to vocational education.

Access to Post-Secondary Education

Even without vocational education, or that component which genuinely is post-secondary, but including university overseas and transnational education, there is extensive provision of post-secondary opportunities for students in Hong Kong.

As in Table 2, for the peak cohort of 93,300 18 year olds in 2007, the result of a Dragon Year, 67% of 18 year olds have access to post-secondary education.

Table 2
Access to Post-Secondary Education for Hong Kong Students: Mixed Years

Type	Places
Bachelor's Degree	17,352
Sub Degree	32,570
Transnational Education	3,960
Overseas Education	9,000
Total	62,882

Hong Kong students have not accepted that only 18% can enter university. Hong Kong students have judged that they have the ability to complete university degrees, and have judged that the economic benefits of a university degree are worthwhile, in an economy that demands more graduates than its universities produce.

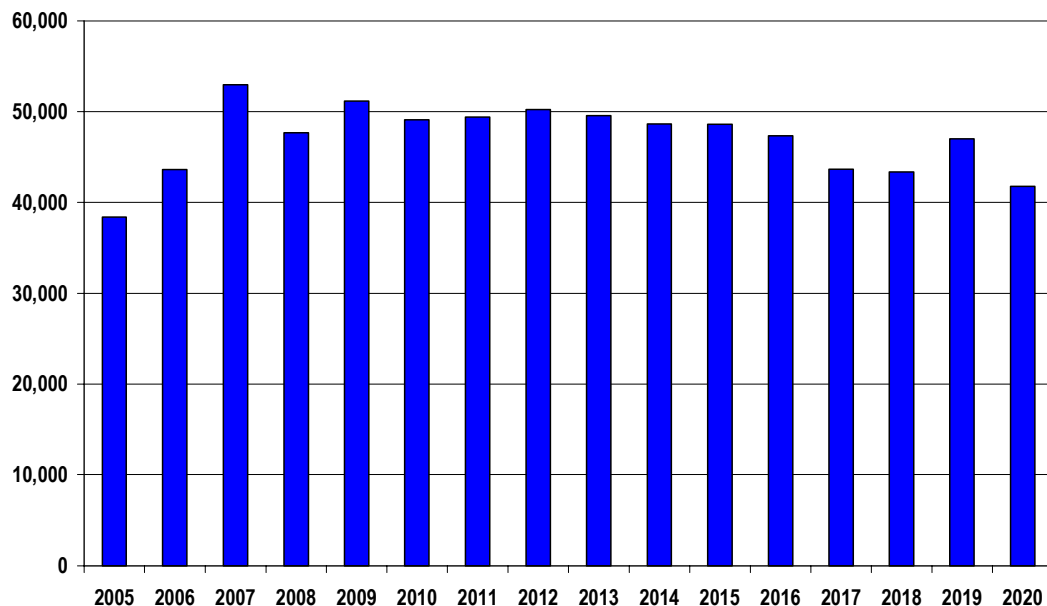
Hong Kong students have studied overseas, they have studied in transnational education in Hong Kong and they have embraced sub degree programmes, to the extent that 67% now have access to post-secondary education.

Singapore

1988 was a Dragon Year in Singapore also, and in 2007 there are 53,000 18 year olds.

Chart 2

Number of 18 Year Olds in Singapore



Singapore has been expanding its provision of first year, first degree places as it approaches the Dragon Year in 2007. The 2006 **Education Statistics Digest**¹⁴ reports an intake of 14,716 students into first degrees at universities, including the National Institute of Education, in 2005, equivalent to 38% of 18 year olds in 2005 or 28% of 18 year olds in 2007.

In addition, Singapore provided 22,410 places for entry into polytechnics, including LaSalle College of the Arts and Nanyang Academy of Fine Arts in 2005, equivalent to 58% of 18 year olds in 2005 or 42% of 18 year olds in 2007.

In terms of transnational education, The Observatory on Borderless Higher Education reported 10,838 students in Singapore in transnational education programmes from UK universities in 2004. IDP Education Australia in 2005 reported 14,321 students in Singapore in transnational education programmes from Australian universities. There are at least 25,000 Singapore students in transnational education programmes.

Making similar bold assumptions to Hong Kong about these 25,000 students in Singapore

- if one third are postgraduates and two thirds undergraduates
- if undergraduate courses from UK and Australia are three years in duration
- if two thirds of undergraduates are part time and one third full time
- then there are 3,700 commencing undergraduates in transnational education programmes in Singapore each year.

Unmet demand for higher education in earlier years has created a culture where many Singapore students study at universities overseas.

From Australian Education International, 2,244 Singapore students commenced undergraduate higher education in Australia in 2006. From the Higher Education Statistics Agency, there were 2,035 Singapore students in undergraduate university programmes in UK in 2005/06, suggesting 678 commencements. From **Open Doors**, there were 2,154 Singapore students in undergraduate degree programmes in USA in 2005/06, suggesting 539 commencements. Undergraduate intakes of Singapore students aggregate to 3,461 students per year in Australia, UK and USA.

From the Institute of Education **Atlas of Student Mobility**¹⁵, these three countries accounted for 87% of provision in the Census and Statistics survey, suggesting that 4,000 Singapore students commence undergraduate study overseas each year.

Even without looking at the 13,705 students who entered the Institute of Technical Education in 2005, there is extensive provision of post-secondary opportunities for students in Singapore.

As in Table 3, for the peak cohort of 53,000 18 year olds in 2007, the result of a Dragon Year, 85% of 18 year olds have access to post-secondary education.

Table 3
Access to Post-Secondary Education for Singapore Students: Mixed Years

Type	Places
University	14,716
Polytechnic	22,410
Transnational Education	3,700
Overseas Education	4,000
Total	44,826

Mature Markets

Among the 30 countries in the Organisation for Economic Cooperation and Development, the average entry rate for entry to university in 2004 was 53% (interestingly, 48% for males and 59% for females).

In Australia in 2004, the entry rate to university was 70% (65% for males and 74% for females).

In Hong Kong, the entry rate to university is 18% (or 15.5% in a Dragon Year), but the entry rate to post-secondary education is 67%. In Singapore, the entry rate to university is 28%, but the entry rate to post-secondary education is 85%.

In terms of demand for international education places, Hong Kong and Singapore are behaving as mature markets, behaving not as 18% and 28% markets, but as 67% and 85% markets.

For the USA and UK, in higher education, Hong Kong and Singapore are mature markets, as in Tables 4 and 5.

Table 4
Hong Kong Students in Higher Education in USA and UK

	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
USA	7,627	7,757	8,076	7,353	7,180	7,849
UK				10,575	10,780	9,445

Table 5
Singapore Students in Higher Education in USA and UK

	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
USA	4,166	4,141	4,189	3,955	3,769	3,909
UK				3,905	3,630	3,275

For Australia, Hong Kong and Singapore are mature markets, as in Charts 3 and 4 on the following page.

Chart 3

Hong Kong Students in Australia 2002 to 2006

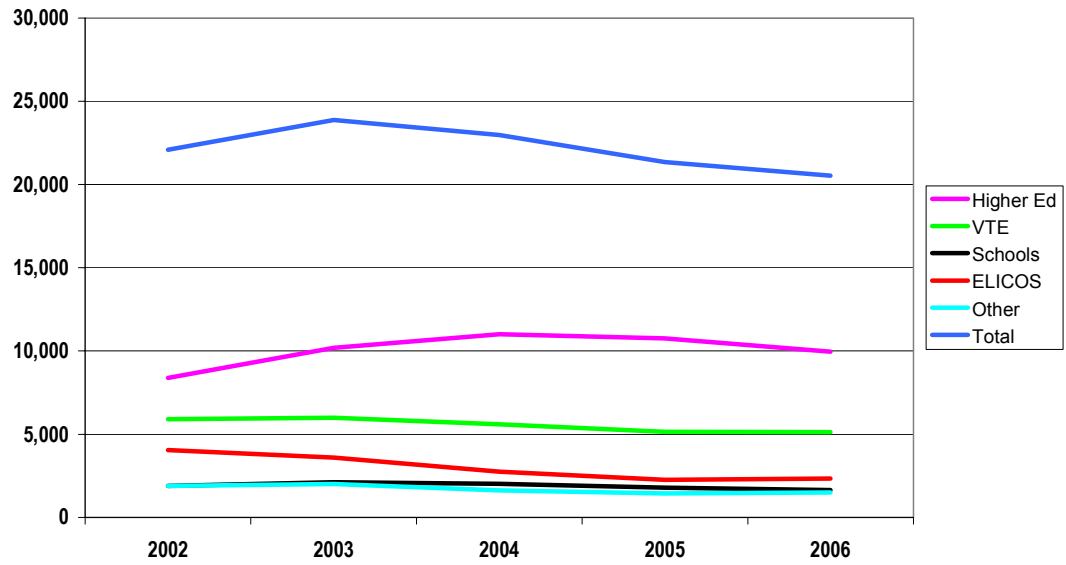
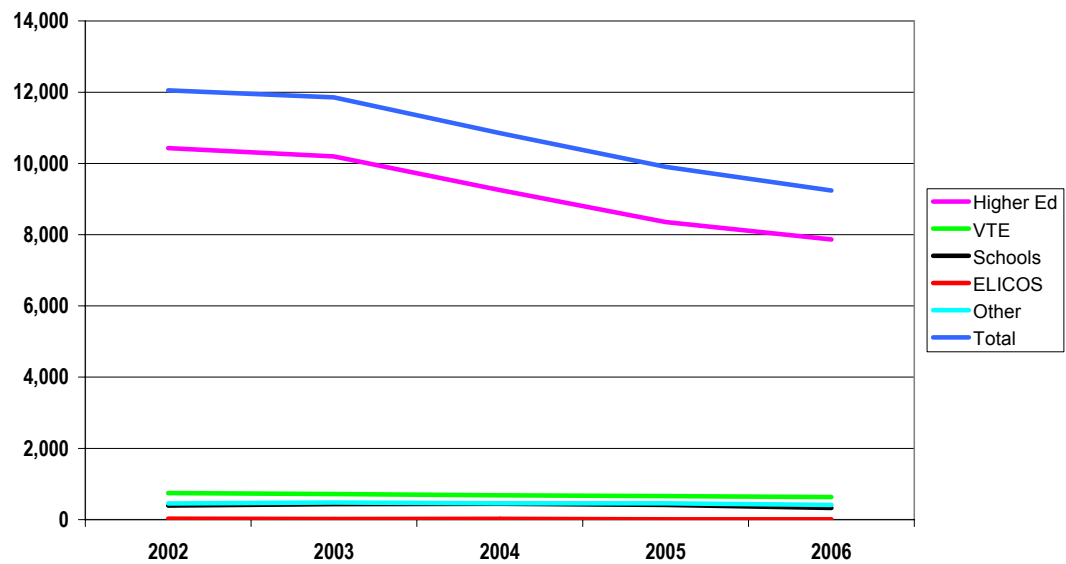


Chart 4

Singapore Students in Australia 2002 to 2006



Hong Kong Market Niches

Hong Kong is a mature market. Australia cannot expect to see numbers of international students from Hong Kong growing substantially.

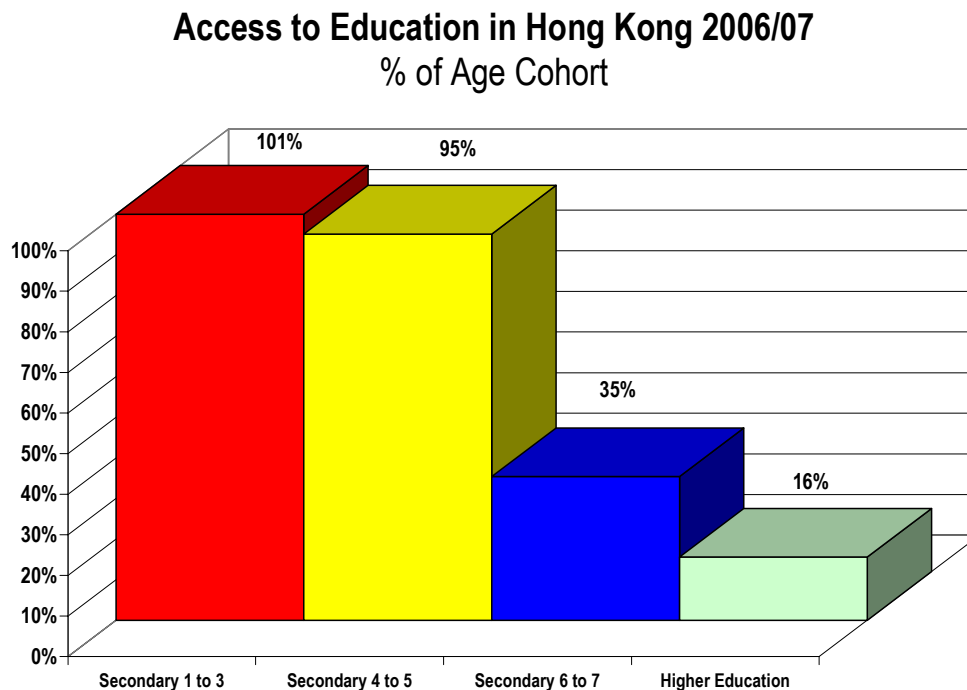
Hong Kong remains an important market for Australia. With 20,523 students in 2006 it ranked fourth as a source of enrolments, behind China, India and Korea. There were 9,000 commencements from Hong Kong in Australia in 2006, including 3,000 in higher education.

Out to at least 2016, the structure of access to higher education in Hong Kong, the fact that there are not enough university places, will require that substantial numbers of Hong Kong students will go to university in Australia.

Plus there are niches, perhaps three, for Australian education providers.

Hong Kong provides senior secondary education, leading to matriculation, for just one third of a cohort. 60% of Hong Kong 16 year olds leave school before the end of secondary education.

Chart 5



There are Secondary 4 places, leading to the Hong Kong Certificate of Education Examination in Form 5, for 95% of 14 year olds, but Secondary 6 places, leading to the Hong Kong Advanced Level Examination in Form 7, for just 35% of 16 year olds.

Many of these students for whom there are no school places after Secondary 5, 60% of a cohort, 50,000 students each year, want to attend university, and Hong Kong's workforce needs them as graduates. These students need pathways to higher education, and Australia's pathways, whether they are in vocational training and education or in foundation studies, are attractive to Hong Kong students. Pathways make up an important niche. This is the first niche, but from 2011, when education reforms provide near universal participation in senior secondary education, students will no longer leave school at age 16 to go into pathways.

The second niche involves top up degrees.

In Hong Kong, the process of associate degrees and top up degrees is not fully developed.

In Singapore, the understanding is that seven of ten Polytechnic Diploma holders will seek to convert the Diploma to a Degree within five years of completion. Because of issues of double-dipping in subsidised places and crowding out of school leavers, most of these students will not go to universities in Singapore, but will go overseas or enrol in transnational education programmes in Singapore.

The Singapore experience suggests that there is, or will be, substantial unmet demand in Hong Kong for conversion of sub degree to degree programmes, using top up degree programmes, in universities overseas or as transnational education programmes in Hong Kong.

The Education and Manpower Bureau's **Review of the Post-Secondary Education Sector** takes a similar view on articulation.

There is a common perception in the local community that sub-degree, in particular [Associate Diploma], is primarily a bridging qualification for admission to degree programmes. As the number of sub-degree holders increases, the demand for articulation places also increases. There is general support for more of them to be provided in the [university] sector.

Most students will hope to see credit transfer mechanisms that enable them to have access to a wide range of study programmes in different institutions. The Government supports institutions' initiatives in this regard. There are suggestions that institutions should set common baselines for the admission of Associate Degree graduates into undergraduate programmes to ensure consistency.

Recommendation 13: We recommend that, where resources permit, more publicly-funded articulation places should be provided, and that institutions should be encouraged to develop credit transfer mechanisms.

The **Review of the Post-Secondary Education Sector** reported 32,570 places at sub degree level in 2005/06. These students are completing their sub degree programmes now.

Again, there are issues of information transparency. From University Grants Committee¹⁶ data, 7,000 students completed sub degree programmes in universities in 2004/05 and 1,220 students were admitted to senior years of undergraduate programmes in 2005/06. The universities provided 1,680 articulation places in 2006/07. Access to data outside the universities is a problem.

Clearly there is demand for many more articulation places, many more top up degrees. Students who have studied in Hong Kong for the first component of the qualification, the sub degree, no doubt would like to stay in Hong Kong to complete the second component, the top up degree.

But, as with the Singapore experience, because of issues of double-dipping in subsidised places and crowding out of school leavers, most of these students will not go to universities in Hong Kong, but will go overseas or enrol in transnational education programmes in Hong Kong.

This is the second niche.

The third niche is simpler.

Secondary education and undergraduate university education in Hong Kong have started a ten year process of reform. Some Hong Kong students and their parents may choose to avoid the turbulence of this reform, by studying overseas. With the first students affected by this turbulence about to enter the second year of secondary education, schools overseas may start to receive enquiries from Hong Kong students and their parents.

Education Reform in Hong Kong

60% of Hong Kong 16 year olds leave school before the end of secondary education.

Hong Kong is committed to reforming this waste of talent. Hong Kong will move

- from seven years of secondary education, with senior secondary education available to one third of a cohort, to six years of secondary education, with near universal participation
- from three years of university education, with first year, first degree places for 18% of 18 year olds, to four years of university, with no increase in access.

The first children affected have just completed Secondary 1. After two more years of junior secondary, most of these students will commence three years of senior secondary education in mid 2009 to sit for the Diploma of Secondary Education in mid 2012.

The intention is that the Hong Kong Diploma of Secondary Education at the end of six years of secondary education will be a world class qualification. This examination will serve the dual functions of an exit assessment for secondary school education as well as selection for admission to higher education. This new examination will need to be recognised by local and overseas universities.

On 5 July 2006, Hong Kong's universities announced their admission requirements based on the Diploma of Secondary Education, with a suite of documents under 334 Publications Information on the Education and Manpower Bureau site¹⁷.

Australian universities and other higher education providers will need to look at the issue of recognition of the Hong Kong Diploma of Secondary Education as a basic admission requirement and also in terms of the results required for admission across a range of programmes. There is detail on these issues in an earlier paper¹⁸.

While recognition decisions, of course, will be made by individual universities, there may be merit in a joint approach to recognition of the Hong Kong Diploma of Secondary Education, at least as a basic admission requirement.

From mid 2012, university courses in Hong Kong will increase to four years, providing the opportunity for broadening the scope of learning in universities and deferring the process of specialisation. The four year undergraduate programme also provides more space to develop well-rounded graduates, for example by increasing opportunities for international student exchange.

There were 50,009 undergraduates in Hong Kong's universities in 2005/06.

With three year degree programmes increasing to four years, and 14,500 first year, first degree places each year, the move to four year degrees will mean that universities will need to increase their capacity to 64,500 undergraduates by 2016.

The Minister for Education and Manpower in 2004¹⁹ estimated that, in terms of recurrent expenditure, an additional year of university studies will cost at least an extra HK\$1.8 billion per year.

We propose that a shared funding arrangement be adopted, namely, the parents will pay higher tuition fees while the extra recurrent expenditure will be borne by the whole community through the general revenue of the Government.

We estimate that the non-recurrent expenditure for the new academic structure will be about HK\$6.7 billion, which covers development of the new curriculum, professional development for teachers, provision of additional university complexes and facilities, and increase in the number of classes during the transitional period. The Government stands ready to bear all the non-recurrent expenditure.

There will be no increase in access, and no capacity to increase access, with university budgets focused on increasing from three years of undergraduate teaching to four years. The allocation of these budgets to the additional year of higher education will make it impossible for the Hong Kong Government to fund any expansion in access to higher education, at least until after 2016.

Double Cohort

There will be a double cohort in mid 2012, when the last students with seven years of secondary education, and the first students with six years of secondary education, leave school at the same time.

Hong Kong's universities will handle the double cohort by admitting two intakes of undergraduates in two shifts at the same time in mid 2012. Effectively, Hong Kong's universities will adopt a morning shift and afternoon shift approach as the double intake moves through.

Hong Kong's universities need to increase their undergraduate capacity to 64,500 by 2015 at the latest, to accommodate four year degrees. The decision has been made to increase the capacity from 2012.

In mid 2012, Hong Kong's universities will admit 14,500 students from the last Hong Kong Advanced Level Examination (seven years of secondary education) and provide these students with the last three year degrees, graduating them in 2015. At the same time, in mid 2012, they will admit 14,500 students from the first Hong Kong Diploma of Secondary Education (six years of secondary education) and provide these students with the first four year degrees, graduating them in 2016.

As a result of this approach, there will be first year, first degree places for 18% of a cohort right through the reform process, and there will be 14,500 completing undergraduates every year.

There will be 29,000 students in two different first year courses in 2012/13, 29,000 students in two different second year courses in 2013/14 and 29,000 students in two different third year courses in 2014/15, of whom 14,500 will graduate and 14,500 will go on to the first fourth year in 2015/16.

In Table 6, 2011/12 is the last normal year of the current system, 2015/16 is the first normal year of the new system.

Table 6
Hong Kong's Double Cohort Moves through Undergraduate Degrees

	First Year	Second Year	Third Year	Fourth Year	Later Years*	Total	Graduates
2011/12	14,500	14,500	14,500		6,500	50,000	14,500
2012/13	29,000	14,500	14,500		6,500	64,500	14,500
2013/14	14,500	29,000	14,500		6,500	64,500	14,500
2014/15	14,500	14,500	29,000		6,500	64,500	14,500
2015/16	14,500	14,500	14,500	14,500	6,500	64,500	14,500

* Later years such as Medicine

Issues for Australia

There are two issues for Australia.

First, Australian higher education providers will need to look at the issue of recognition of the Hong Kong Diploma of Secondary Education as a basic admission requirement and also in terms of the results required for admission across a range of programmes.

Second, Australian education representatives and Australian institutions will need to look for opportunities to confirm to people in Hong Kong, essentially to students and their parents, and to graduates and employers, that an Australian three year degree is equivalent to a Hong Kong four year degree, by the time that Hong Kong's first four year graduates complete their degrees in 2016. At the official level, Australia can expect that Hong Kong, as a key economy in the global flow of talent and scholars, will continue to recognise Australia's (and the UK's) three year degrees. The greater issue may be at the street level.

Provided Hong Kong continues to recognise three year Australian degrees, the education reforms in Hong Kong will bring opportunities for Australian universities.

From 2012, most 17 year olds will complete school. If the proportion matriculating grows from 35% in 2007 to 75% in 2012, as a consequence of near universal completion of secondary school, there will be an additional 34,000 Hong Kong high school graduates each year seeking university entry. These high school graduates are unlikely to be satisfied with sub degree programmes.

In 2019, when the number of 17 year olds drops to 44,000, there will be 33,000 high school graduates and 18,500 will need to seek university places outside Hong Kong.

With no increase in access to university in Hong Kong, more Hong Kong high school graduates will seek university places in Australia. Because of their grades in the Diploma of Secondary Education, some will continue to need pathways to university in Australia.

Into the future, there will continue to be fundamental, structural demand from Hong Kong for university places in Australia, the sort of demand that has made Hong Kong Australia's fourth largest source of demand for higher education.

Conclusion

In the years leading up to the handover of Hong Kong, ten years ago at midnight tonight, the last British Governor, now Lord Patten, persistently warned that 1 July 1997 was fixed in the calendar.

On the issues of recognition in Australia of the Hong Kong Diploma of Secondary Education, and continued recognition in Hong Kong of Australian three year degrees, we should heed Lord Patten's warning: tick tock goes the clock.

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