



PARTHENON

Higher Education in UAE

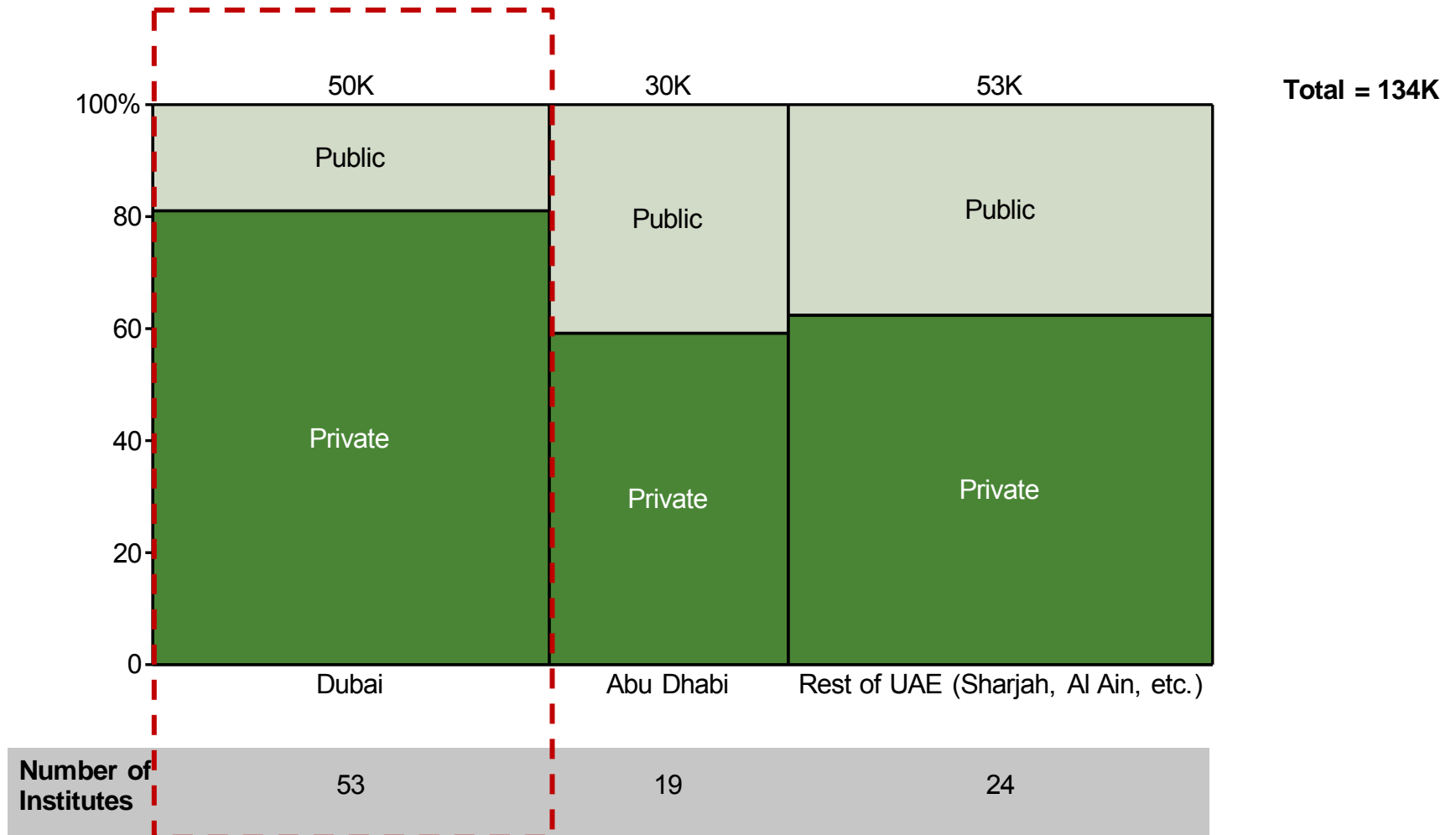
Key Trends and Opportunities

Prepared By Parthenon for
IHC's Education Summit, Dubai



~140K students are enrolled in higher education universities in UAE; Dubai accounts for ~40% of the overall enrolments

Higher Education* Enrolment in UAE by Emirate, 2014

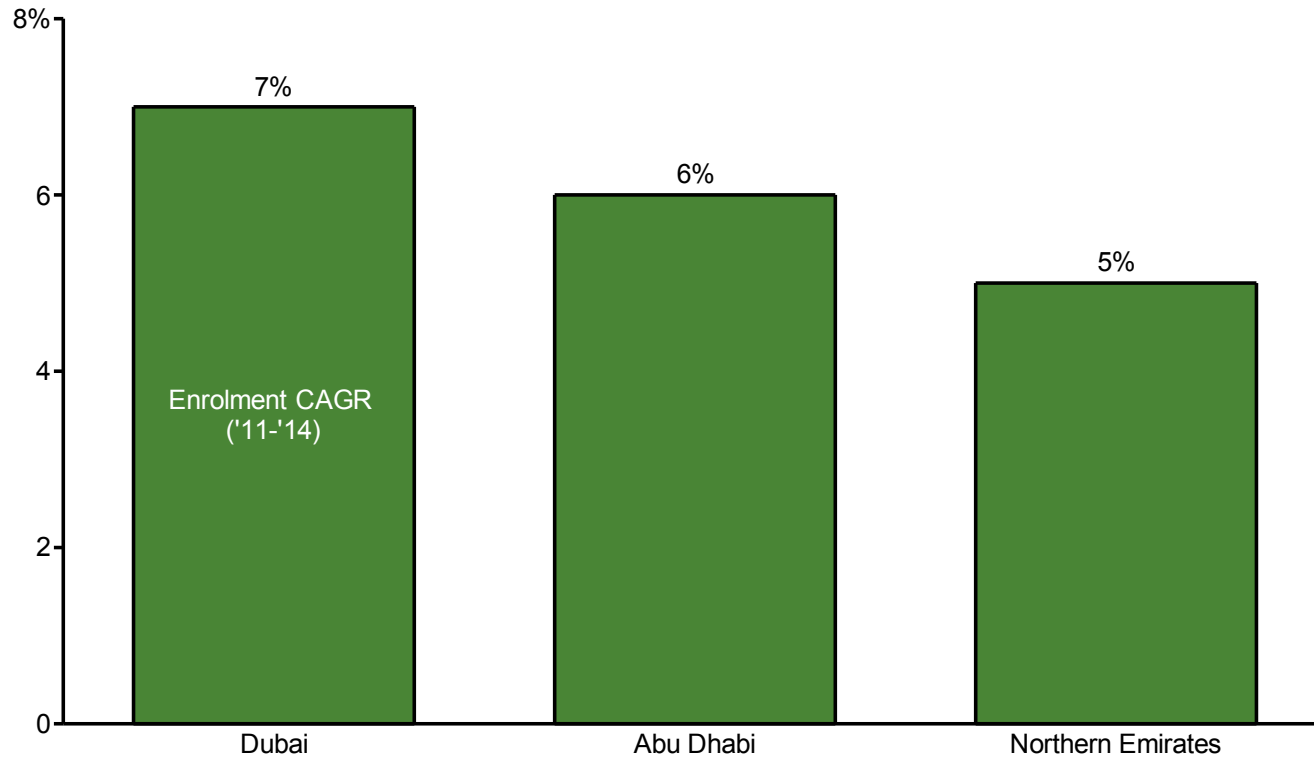


Note: The enrolments for 2013/14 have been estimated based on 2012/13 enrolments assuming the growth rate from 2010/11 to 2012/13 for Abu Dhabi and Others; *Does not include vocational education enrolments

Source: Parthenon Higher Education Survey; KHDA; MOHESR; UAE National Bureau of Statistics

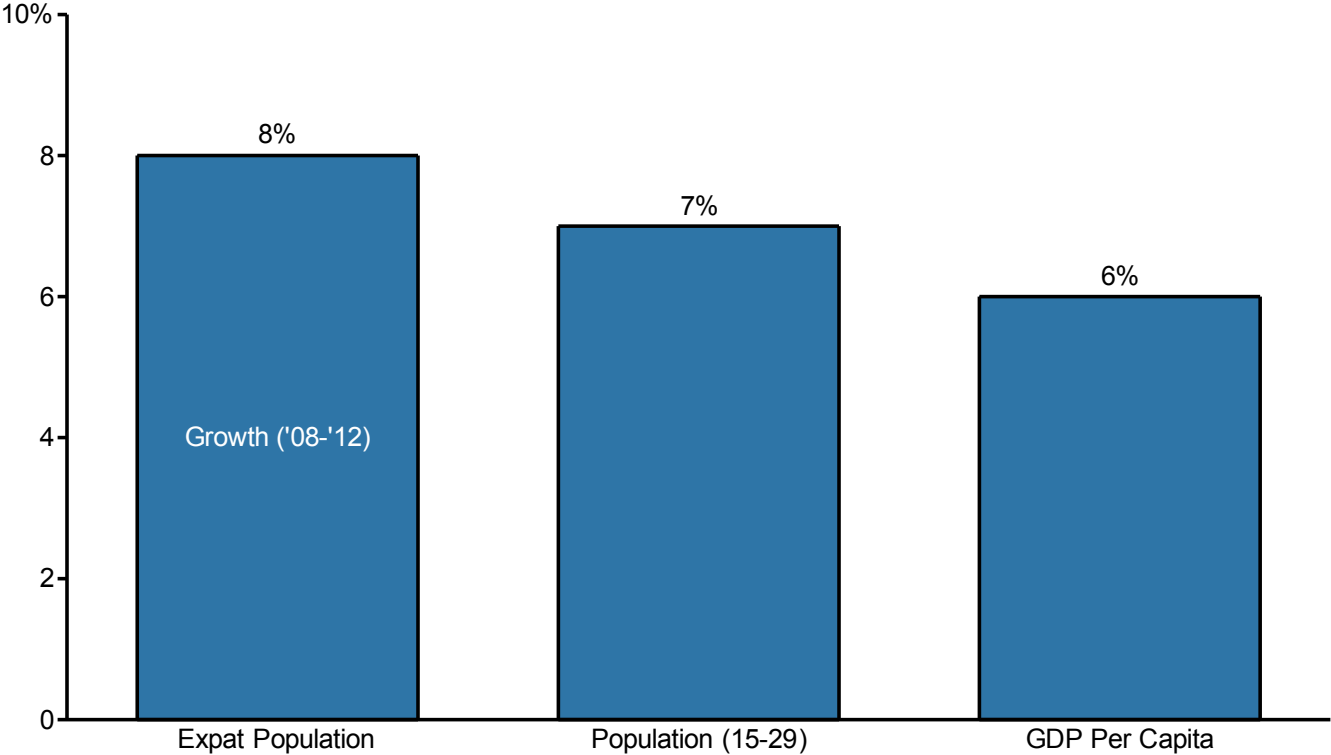
Dubai enrolments are also growing faster than the other Emirates

Enrolment Growth, By Emirate, 2011-2014

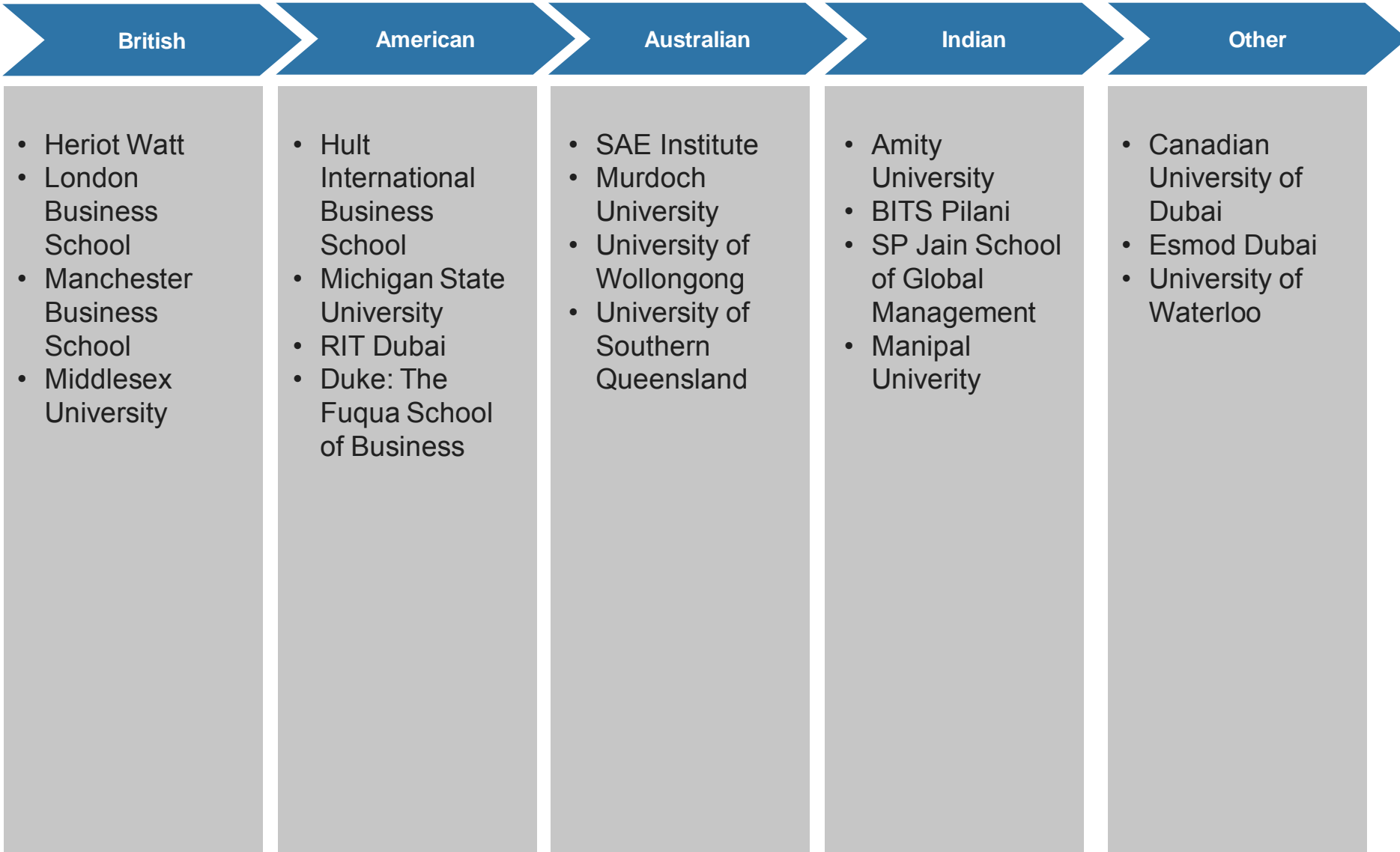


The drivers of private education in Dubai continue to increase

Growth of Private Education Drivers, Dubai, 2008 - 2012



There is a wide range of university foreign branch campus offerings in Dubai



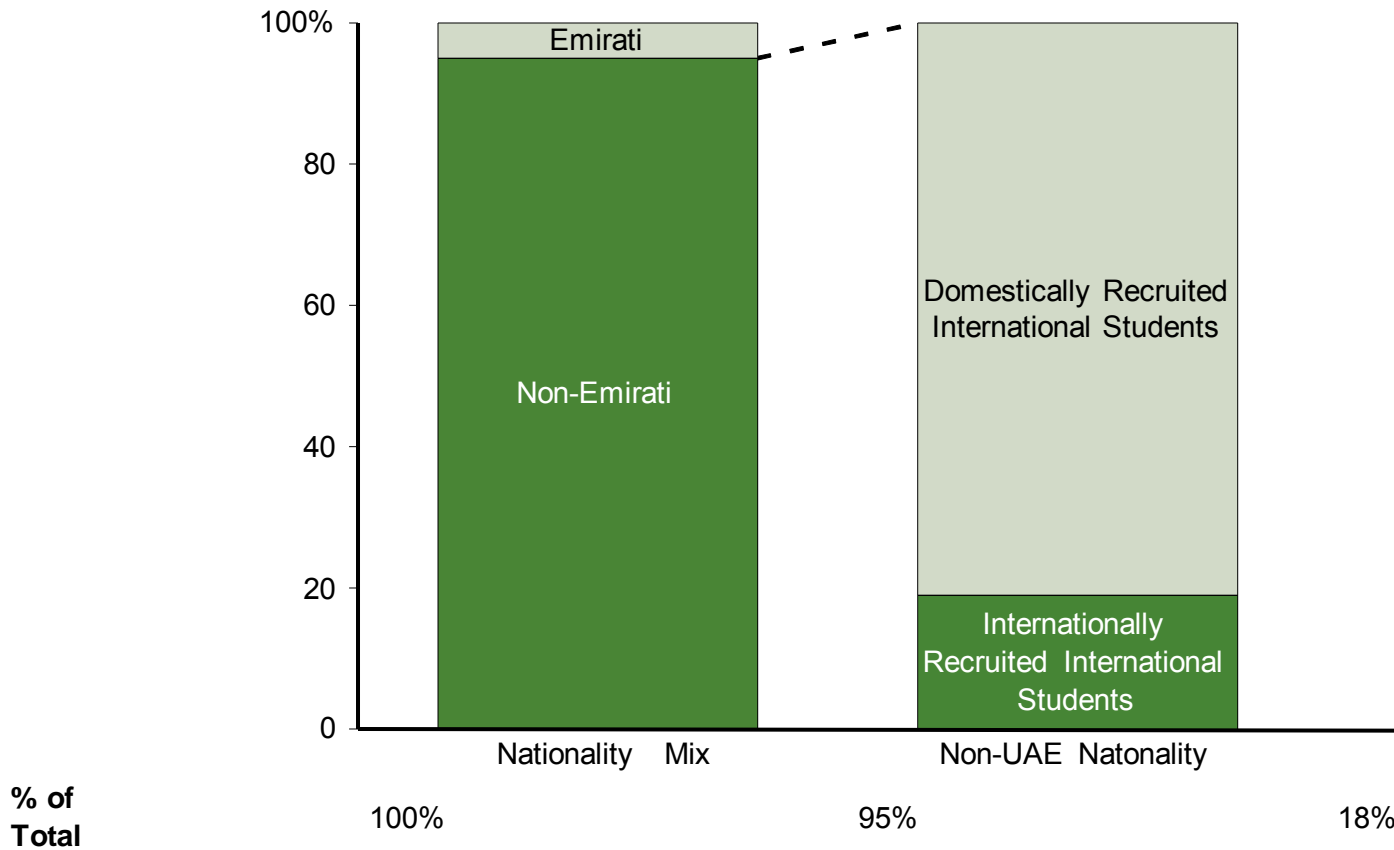
Dubai has been successful in attracting a wide range of options due to its favourable regulatory environment

	Dubai	Singapore	Malaysia
Complexity of Regulations			
Time Required to Obtain Approvals	 3-6 months	 9-12 months	 24-30 months
Foreign Ownership			
Approval Body			
Ease of Entry			

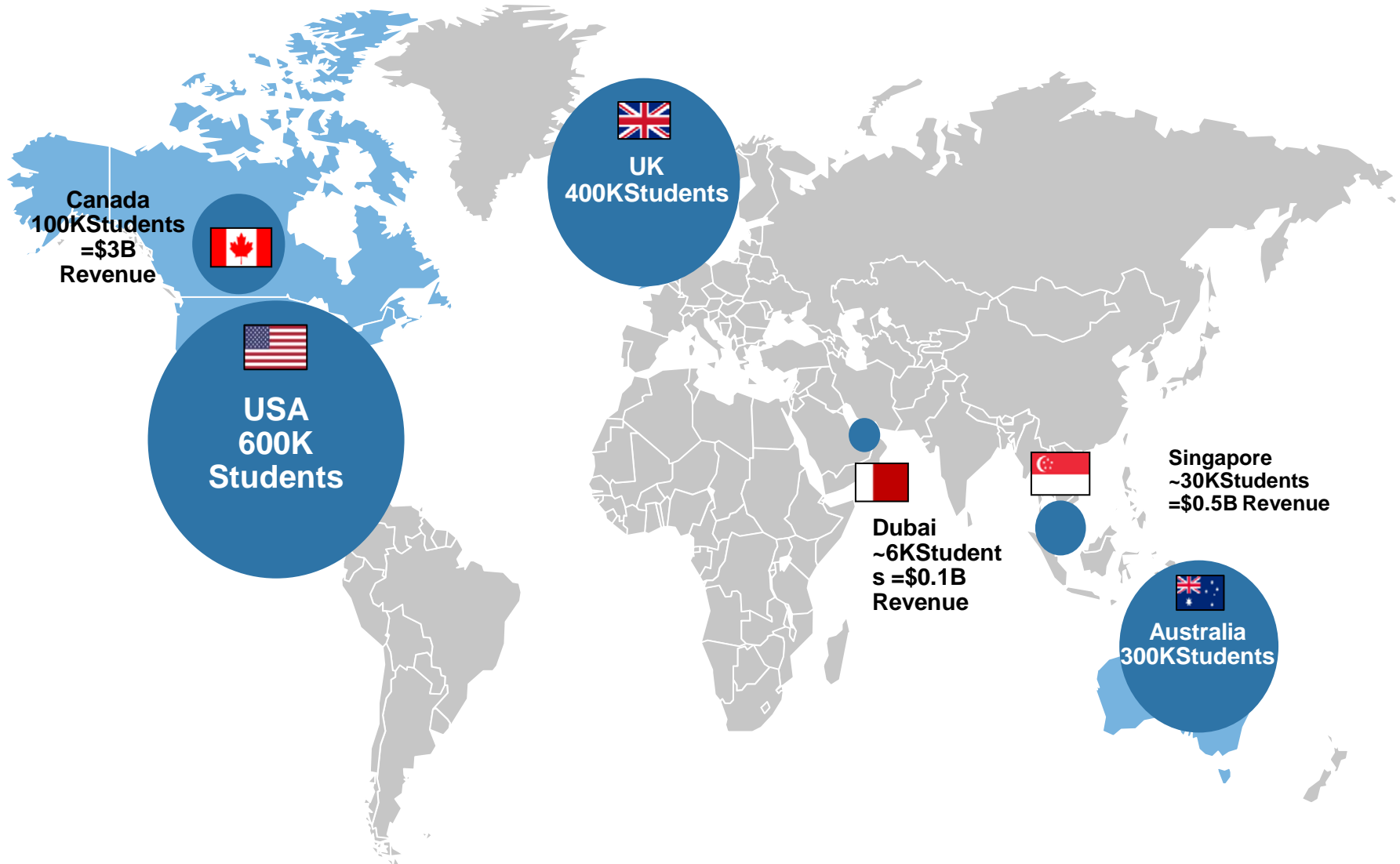


However, despite Dubai's key assets most students are still domestically recruited

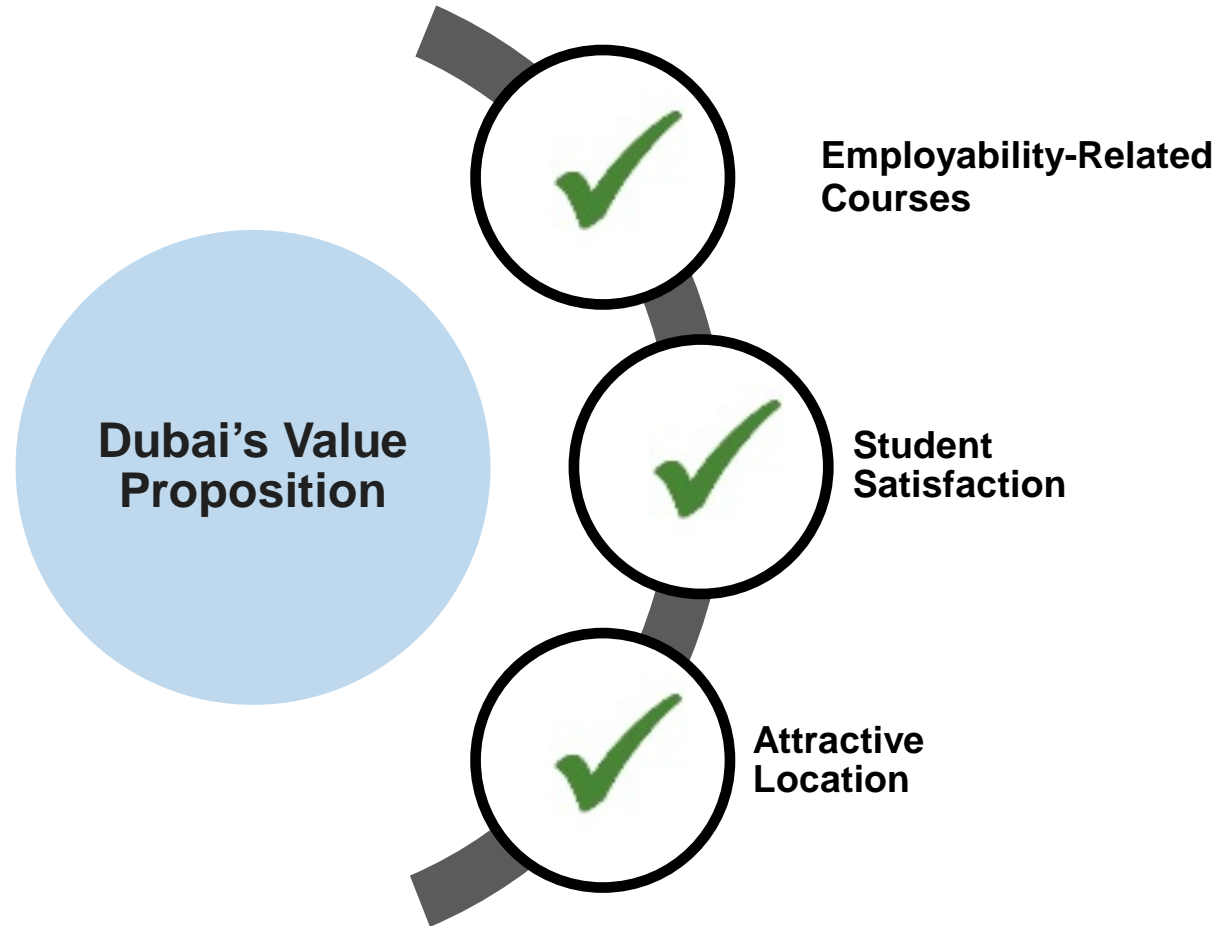
Nationality Composition of Private Western Institutes, 2011



Students are increasingly mobile; transnational education takes ~2.5M students every year to global hubs

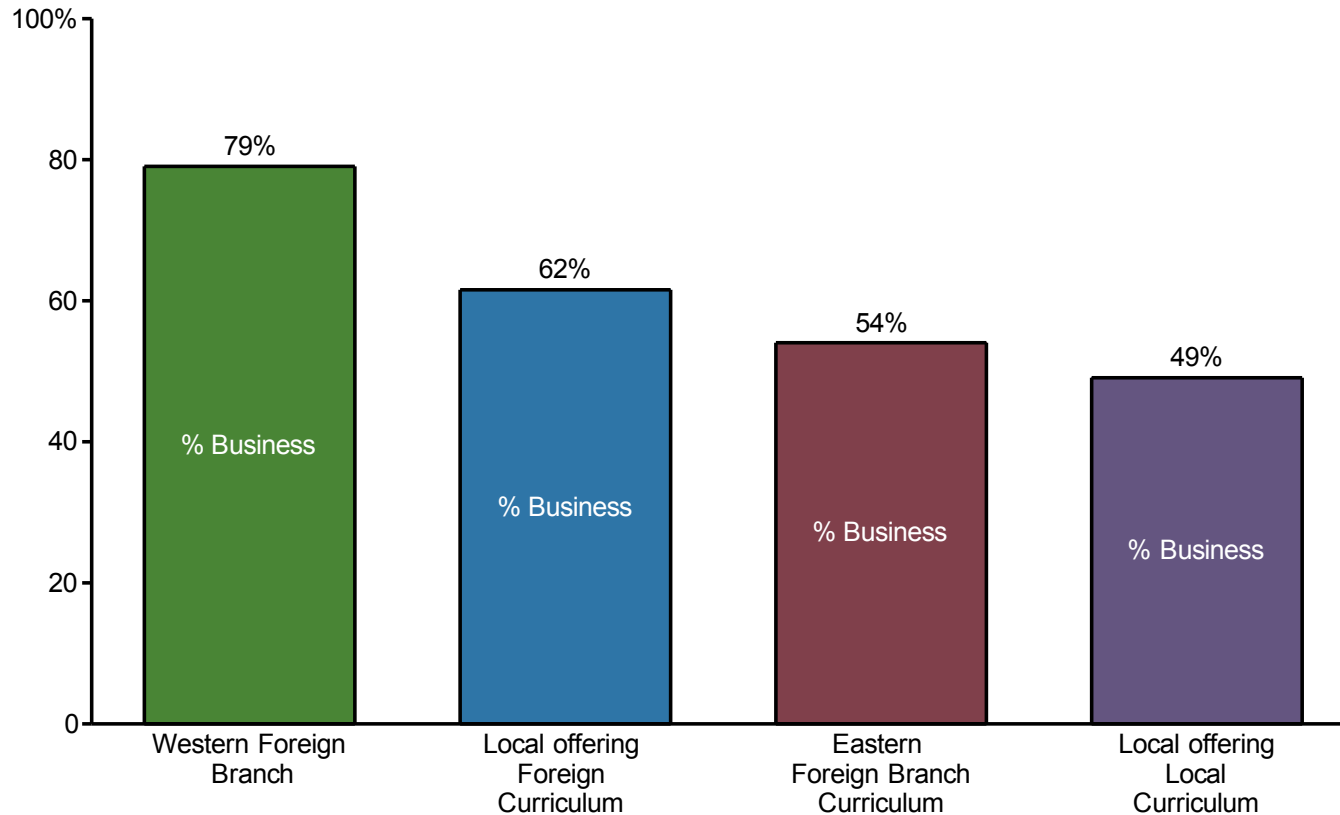


Dubai's value proposition for higher education students is driven by three key assets



Employment related courses are driving growth across the different university segments, particularly in the Western foreign branches

% Business Enrolments, By Type of University, Dubai, 2014



Why is Dubai an attractive destination for students?

1

Close to the World

- Ideally located to attract European, African, East, Southeast Asian, South Asian, GCC, and CIS students

2

Safe

- Safe environment for students, an important factor for both students and families

3

English Speaking

- Students can use and improve their English, and the degree is well perceived internationally

4

Strong Economy

- A fast-growing economy in need of graduates in a variety of industries

5

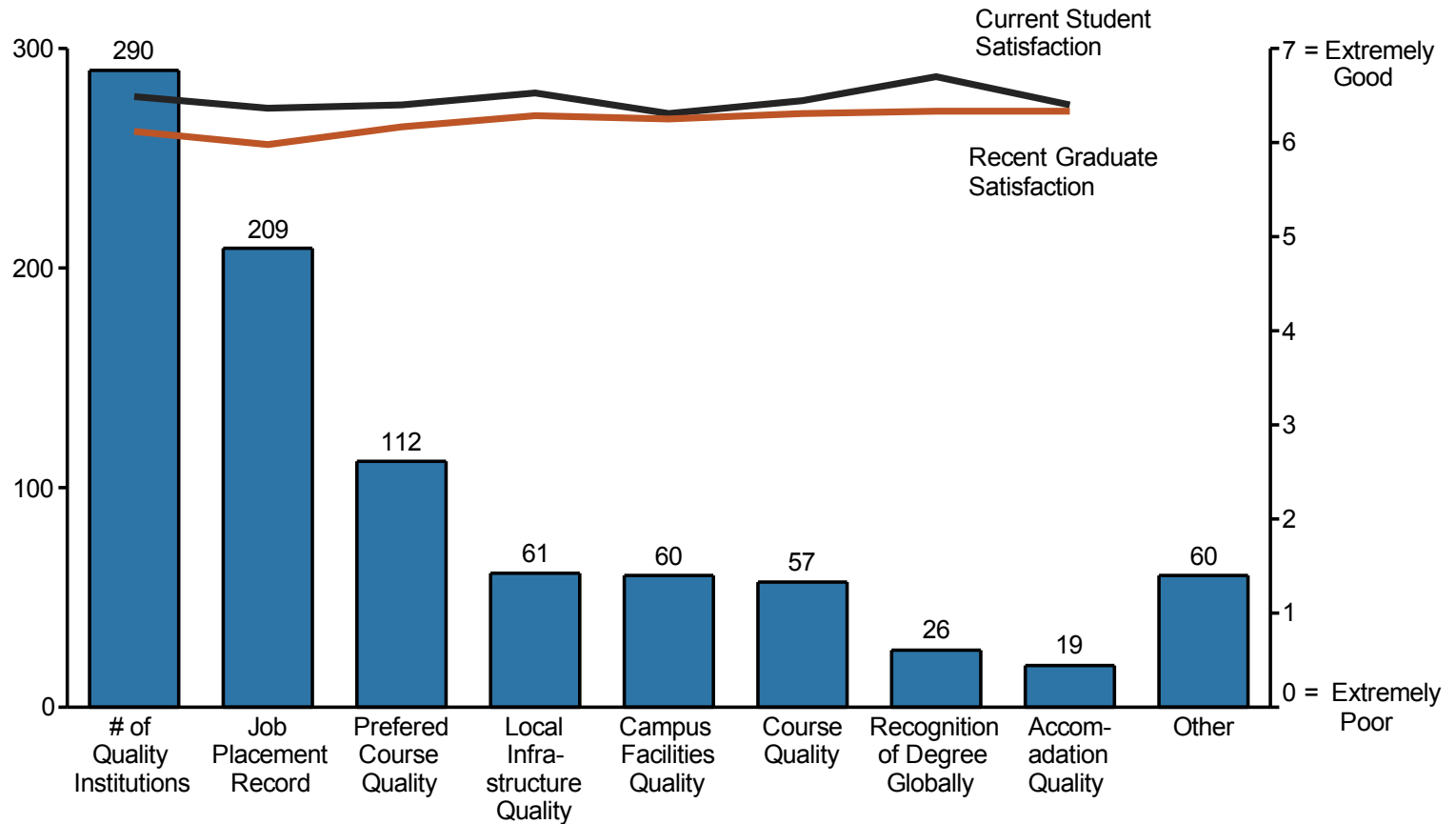
Quality of Life

- Diverse, culturally active city
- Expo 2020 host city will attract global attention



Satisfaction with the Dubai experience is high among both current students and recent graduates

Q. Which of the following factors did you consider when selecting a country/city for higher education?
 Q. How does Dubai rate on the top 3 factors?



How can Dubai increase international students?

1

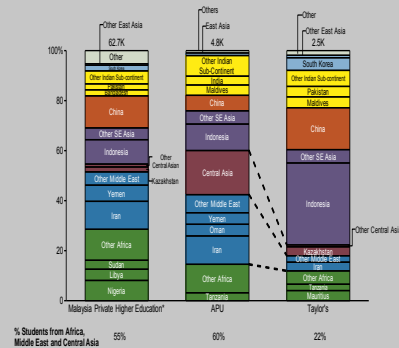
Develop “Education Dubai” Brand

- Develop regional/local messaging and product

2

Identify Key Source Countries

- Prioritize markets based on growth rates and external factors



3

Develop Strategic Marketing Plan

- Target the identified source markets through relevant language and channels

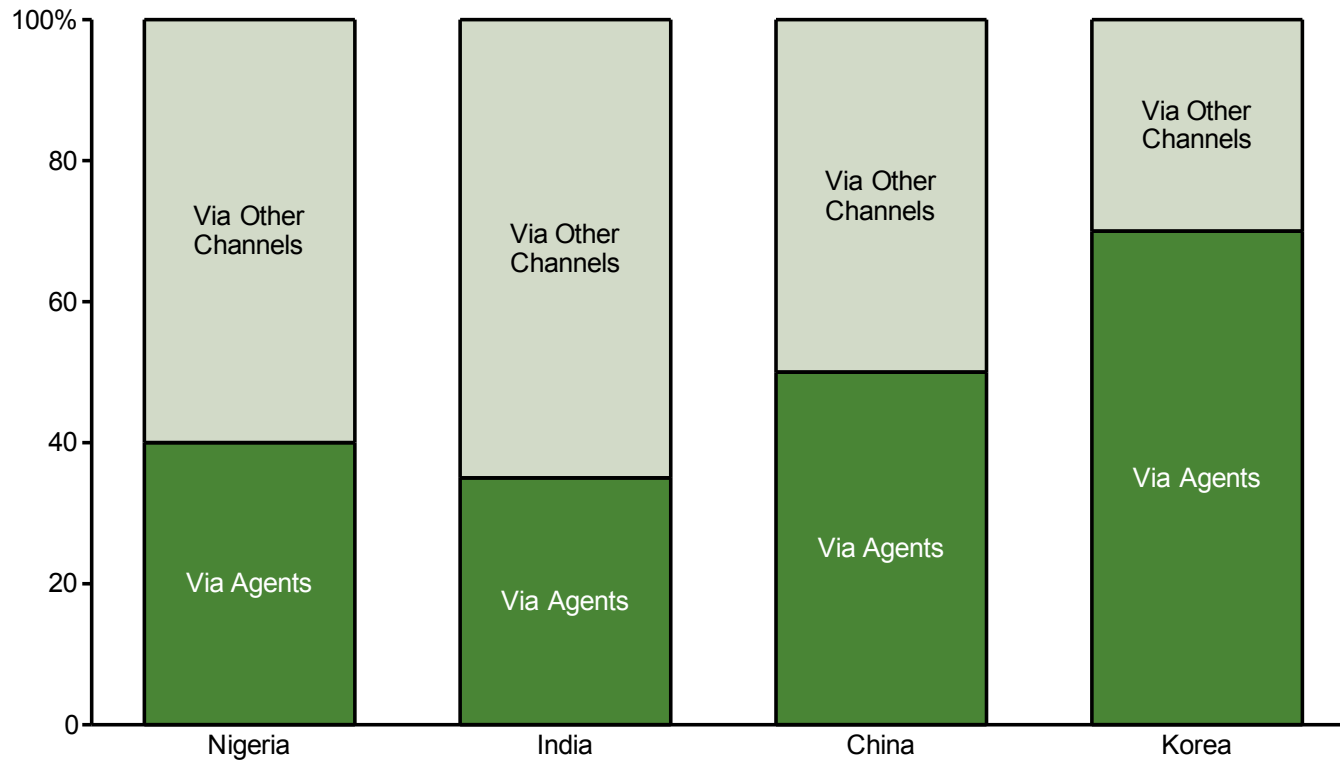
4

Build Relationships with Agents

- Develop relationships with agents or agent aggregators in the identified markets

Agents are a top marketing channel whose use continues to increase in key source markets

Students Using Agent Channels from Selected Source Countries, 2014



Provision of sales support from the university is the key driver in building effective relationships with agents

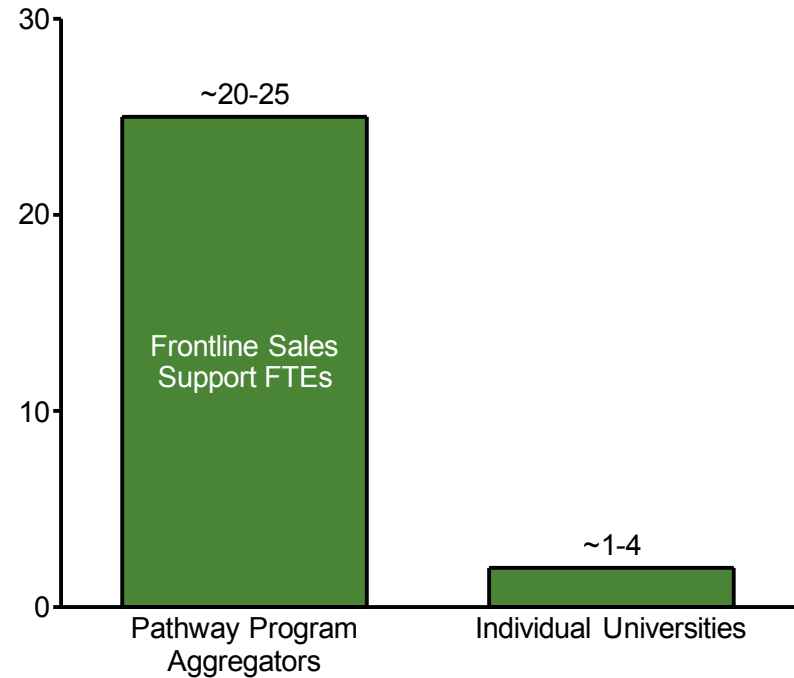
Q: [For Agents] What are key factors that influence your decision to promote an institution?

100%		
Incentives		
Product Offerings	Quality of Institutions Variety of Courses	Quality of Institution 1. Courses delivered with high-quality standards 2. Good reputation relative to what it offers
Sales Support	Sales Support Includes:	High Quality Marketing Material is Critical to:
	<ul style="list-style-type: none"> • In-Office Visits • Responsiveness (Enquiry Time) • Fairs and Exhibitions Support • Quality of Marketing Materials 	<ul style="list-style-type: none"> • Build brand amongst students • Build program familiarity among agents
		In-Office Visits
		<ul style="list-style-type: none"> • Help agents close leads • Act as informal training refresher • Help build rapport with counsellors
Agents from China, India, and Indonesia		

Pathway programs also offer opportunities for students to improve their English while allowing the university to outsource the agent management process

Value Proposition for Stakeholders	
Academic Support	Students – Able to work on English and study skills and attend better university
	Universities – Increase potential enrollment base and provide critical academic and social support systems for international students
Agent Aggregators	Students – More support and options offered during selection process
	Universities – Fully, outsourced international admissions program with more on-the-ground staff promoting programs

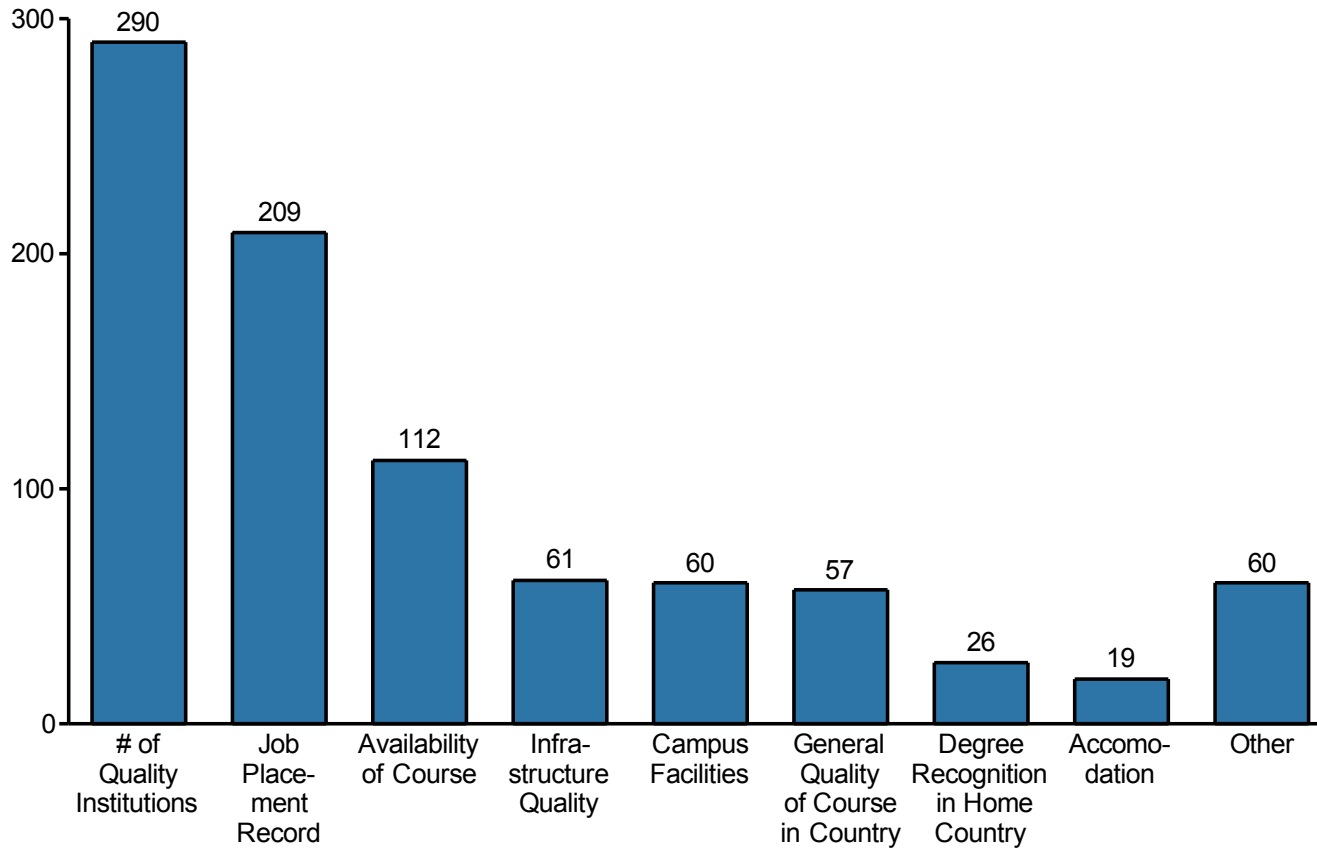
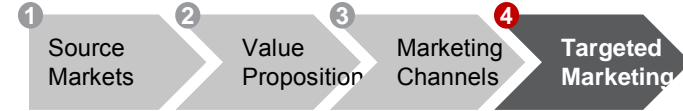
Average Number of Frontline Staff, Aggregator Pathway Programs versus Individual Universities



% Expats	~35%	~0%
Total Support Staff	~30	~5

Parents and students are most concerned with the quality of institutions

Q. Which of the following factors did you consider when selecting a country/city for higher education?



Institutions should promote this and other key selection criteria through their prioritized channels

Marketing materials should communicate the value proposition and be available in relevant languages

Pace University (Kaplan) – China Version



佩斯大学的桥梁课程是专为国际学生进入佩斯大学的本科和硕士学位课程做准备。课程将学术课程及语言培训结合在一起，旨在使国际学生能顺利进入美国顶尖大学的本科和硕士学位继续深造。

排名与荣誉

- 佩斯大学的实习项目被列入《News Short List (2013) 》为最佳榜单之一，全美前五
- 2012年在所有美国院校中，佩斯大学的就业率最高比全国平均水平高出10%
- 获《Business Week》与《Money》杂志各自可保推荐的最佳学校之一
- 佩斯大学被《福布斯》杂志列入《College That Will Make You Rich》
- 佩斯大学连续三年在《U.S. News & World Report》(全美) 大学排名中名列前茅
- 佩斯大学连续三年在《U.S. News & World Report》(全美) 大学排名中名列前茅
- 超过2,000名教授在佩斯大学担任教授或系主任，BIBO的董事长及执行总裁，Cisco公司的执行副总裁及财务总监，IBM全球及亚太区美国业务的负责人等

Ranking information on Page 2, reflecting importance of rankings to Chinese students

Pace University (Kaplan) – English Version

Rankings & Accolades

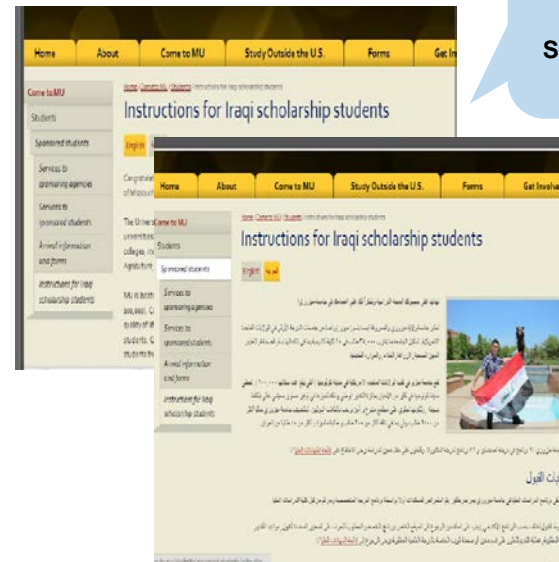
- Pace's Lubin School of Business is accredited for both business and accounting by AACSB International – an elite distinction shared by the top 2% of business schools in the world
- #1 in New York Metropolitan Area and Top 5 in the U.S. for Internship placements by U.S. News Short List (2013)
- Pace University is one of the "Top 50 Colleges That Will Make You Rich" by Forbes.com
- One of the "Top 50 Colleges in the U.S. whose graduates have the Highest Salary Potential" by BusinessWeek Magazine
- In 2012, the job placement rate for Pace University graduates was 94% higher than the national average among all U.S. universities and colleges
- Pace University has been ranked among the top 100 Entrepreneurial Colleges and Universities in the United States for 3 consecutive years by Entrepreneur Magazine



International edition puts rankings on page 6

University of Missouri

Clear Information on Scholarships for Government-Sponsored Students in Arabic and English



Pastoral care and student experience are important aspects to focus on enhancing and promoting on the university website

Examples of Pastoral Care Services Provided to Students On Arrival

From Kaplan (Extract from Kaplan website)

Full service accommodation pack

What's in my KIC Student Pack?

At Liverpool International College we understand that moving country can be a challenge. To make your move as organised as possible we have created the KIC Student Pack, which comes complete with every item that you will need to settle into your new accommodation. You will receive extra items that are not provided in a privately rented accommodation, such as all the main essentials that you'll need for cooking and eating. We will even give you a warm duvet, pillow and a full set of fresh bed linen so you don't have to rush around the shops on your first day.

Provide students with a care packet



This new KIC Student pack contains

Information on Airport Pickup Services (Extract from Study Group website)

UNIVERSITY OF LINCOLN International Study Centre

ISC Home
International Year One
The Masters
Study at Lincoln
Life on campus
Admission
Visas
Pre-arrival information
Fees and payment
Contact
Latest news

Pre-arrival information for new students

If you are a new student coming to the University of Lincoln International Study Centre, this information should answer some of your questions and help you plan your arrival in the UK. We look forward to welcoming you here at the ISC and ensuring that you have a good start to your studies.

Students starting on 23rd September 2013

Students who do not arrive for the first day of term may be required to take additional classes in order to remain on track - additional costs will be incurred which students will be required to pay in Centre.

Students starting on 14th October 2013

It is extremely important that you arrive on time on 12th October ready for the first day of term on 14th October. On your first day at the ISC please meet at the Admin Office (Room/VH2002) in the Village Hall (Building 20 on the map) at 10am. Download a campus map.

Accommodation

If you arrive outside of the arrival weekend (21st and 22nd September for September start and 12th and 13th October for October start) and have not provided your travel plans, there may be a delay in issuing your room key and you may have to stay in a hotel. Please provide your flight details to our International Admissions Centre as we know when to expect you. You can email the information to admissions@uliv.ac.uk. Please note that if you have been allocated a room at 20, Maria Hall, please ask your last translator to visit while you collect your keys from the Accommodation Office as the accommodation is a few minutes away from the office. Also you can buy bedding, appliances and food from local shops so you don't need to bring it in your luggage.

What to pack

Essential items to bring with you include:

- Passport*
- Visa/Home Office letter*
- CAS*
- Offer letter*
- Qualifications certificates
- Passport style photographs
- Accommodation documents
- A towel
- Essential toiletries and medications
- An alarm clock - for those early starts!
- Photographs of family and friends to make you feel at home in your new room

*These items should be packed in your hand luggage.

It is important that you have original copies of all documentation on paper not in electronic format on i-phones, iPads or other electronic devices.

Each apartment is provided with kitchen/dining facilities fully fitted with cookers and a fridge.

Arriving in your room you should find a pre-ordered bedding pack. The bedding packs cost £25 and will be charged against your student account. No cooking utensils, crockery or cutlery are provided and we recommend buying these when you arrive. Staff at the International Study Centre can give you advice on arrival.

Provide students with airport pick-up

About Parthenon and EY

About Parthenon and EY

Parthenon combined with Ernst & Young LLP on August 29, 2014. Parthenon is a leading advisory organization focused on strategy consulting. We are committed to combining our unconventional thinking with our clients' smarts to deliver actionable strategies. In today's complex business landscape, creativity has become a necessary ingredient for sustained success. Together with EY, we have an ideal balance of strengths – specialized expertise with broad executional capabilities, intimate client relationships with larger networks of support, and proven processes along with a progressive spirit – to unlock opportunity for our clients, amplify the impact of our strategies, and make Parthenon the global partner of choice for business leaders.

About Parthenon's Education Practice

Parthenon has served as an advisor to the education sector since our inception in 1991. Our Education Practice – the first of its kind across management consulting firms – has an explicit mission and vision to be the leading strategy advisor to the global education industry. To achieve this, we invest significantly in dedicated management and team resources to ensure that our global expertise extends across public sector and non-profit education providers, foundations, for-profit companies and service providers, and investors. Parthenon has deep experience and a track record of consistent success in working closely with universities, colleges, states, districts, and leading educational reform and service organizations across the globe.

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