



## memo

Behandeladvies › Ter besluitvorming

Aan  
College van Bestuur

Datum  
14 februari 2014

Memonummer  
14/01848

Onderwerp  
Overeenkomst StudyGroup

Bijlagen  
- overeenkomst StudyGroup - RUG  
- conceptbrief Faculteitsbestuur FWN en FEB

### Inleiding

Het Holland International Study Centre (ISC), onderdeel van StudyGroup, verzorgt in Amsterdam programma's (Foundation Year) voor internationale studenten die niet rechtstreeks toelaatbaar zijn aan de Rijksuniversiteit Groningen (RUG). Door een dergelijk 1-jarig Foundation Year te doorlopen en succesvol af te ronden kunnen deze studenten zich alsnog kwalificeren voor toelating tot de gewenste bacheloropleiding aan de RUG. De inhoud van een dergelijk ISC Foundation Year is hierbij aangepast aan de specifieke vereisten van de gewenste RUG bacheloropleiding.

Op dit moment ligt er reeds een overeenkomst tussen StudyGroup en de Faculteit Economie en Bedrijfskunde (FEB) voor het academisch jaar 2013-2014. Ook de Faculteit Wiskunde en Natuurwetenschappen (FWN) wenst met ingang van het academisch jaar 2014-2015 graag de samenwerking met StudyGroup aan te gaan. Zie hiervoor de bijgevoegde conceptbrief van het Faculteitsbestuur van FWN en FEB.

### Aandachtspunten en risico's

#### Inschrijving

Inschrijving aan de RUG staat slechts open indien is voldaan aan de hieraan gestelde vooropleidingseisen (art. 7.37 jo art. 7.24 WHW). Gegadigden voor het Foundation Year van StudyGroup voldoen per definitie niet aan deze vooropleidingseisen, nu juist dit voorbereidende (Foundation) jaar ervoor dient te zorgen dat een internationale student alsnog kan voldoen aan de gestelde vooropleidingseisen voor deelname aan een bacheloropleiding van de RUG.

In het verlengde hiervan is het van belang dat een studievizum voor een aanstaande internationale student door de RUG slechts aangevraagd kan worden indien deze student aan de RUG staat ingeschreven.

De personen die op dit moment het Foundation Year bij StudyGroup volgen, staan niet ingeschreven aan de RUG. Niet als student, maar ook niet op enig andere manier als deelnemer aan het Foundation Year. Dit betekent dat de RUG studieviza heeft aangevraagd voor personen die niet bij de RUG staan ingeschreven/geregistreerd. Mocht de IND bij een steekproef één van deze personen controleren, dan zal de RUG een waarschuwing krijgen. Een herhaaldelijke waarschuwing kan leiden tot het verliezen van de status als referent. Dit zou tot gevolg hebben dat alle door de RUG aangevraagde visa ongeldig worden verklaard.

Kortom, in de huidige situatie wordt de RUG verantwoordelijk gehouden voor personen die onder naam van de RUG een studievizum hebben verkregen, maar die niet staan ingeschreven/geregistreerd bij de RUG.

De International Student Desk heeft deze casus voorgelegd aan de IND. Daarnaast is gekeken naar de administratieve registratiemogelijkheden van aankomende RUG-studenten die een voorbereidend jaar volgen. Aan de hand van deze informatie zou de 'inschrijving' van deelnemers aan het Foundation Year als volgt kunnen worden vormgegeven:

- 1 De deelnemers worden geregistreerd als niet-regulier in ProgressNET, met het label 'ISC Foundation Year'. Voor de IND is dit een acceptabele manier van registratie, en hiermee schrijven we de deelnemers niet in als student, zodat we, conform de WHW, geen studenten inschrijven die (nog) niet aan hun vooropleidingseisen voldoen.
- 2 De deelnemers aan het Foundation Year moeten net als andere non-EU/EER-studenten voldoen aan de studievoortgangseisen van de wet MoMi. Dat betekent dat de studiemonitoring dusdanig moet worden vormgegeven dat bij controle direct de hoeveelheid behaalde punten + percentage behaalde punten zichtbaar is. Over deze studievoortgangmonitoring dienen afspraken te worden gemaakt tussen StudyGroup, de admission officers en de International Service Desk.

#### Overeenkomst

Gezien het RUG-brede karakter van de visumaanvragen en de aanstaande centralisatie van de Admission Offices is het wenselijk dat de faculteiten geen afzonderlijke overeenkomsten (meer) sluiten met StudyGroup, maar dat er een RUG-brede overeenkomst met StudyGroup wordt gesloten.

De thans voorliggende conceptovereenkomst is gebaseerd op de al eerder gesloten overeenkomst tussen StudyGroup en FEB. De overeenkomst met StudyGroup is op een aantal punten aangepast. Zo is de titel van de overeenkomst gewijzigd in "Collaboration Agreement StudyGroup" en is tevens toegevoegd dat het Nederlands recht van toepassing is verklaard.

Op grond van het vorengaande adviseren wij u om akkoord te gaan met het sluiten van de bijgevoegde RUG-brede overeenkomst met StudyGroup en de voorgestelde werkwijze ten aanzien van inschrijving en visumverlening te accorderen.

## **COLLABORATION AGREEMENT STUDYGROUP**

**The University of Groningen, herewith represented by Prof. dr. S. Poppema as President of the executive board, situated at Broerstraat 5, 9712 CP, Groningen, hereafter referred as "RUG";**

**and**

**StudyGroup (Netherlands BV), herewith represented by....., situated at....., hereafter referred as "StudyGroup";**

**Whereas:**

- The Holland International Study Centre (hereafter "ISC"), run by Study Group, will provide quality degree preparation education to international students, who will progress to Dutch partner institutions after successful completion of the ISC programmes;
  - StudyGroup and RUG for that reason want to collaborate in de ISC project;
  - parties want to lay down the key areas in the understanding of the collaboration by the next.
1. This Collaboration agreement specifically applies to the RUG Faculties as listed in Annex I.
  2. StudyGroup has signed a contract with Nyenrode Business Universiteit (hereafter "Nyenrode") which provides StudyGroup with the bilaterally agreed services and facilities required for hosting and running an ISC on the campus of Nyenrode. All ISC students (hereafter "Students") will be provided with a campus accommodation within the capacity limit of the existing Nyenrode student accommodation. StudyGroup is currently also exploring the possibility of moving part of its operation to the centre of Amsterdam.
  3. StudyGroup will, as agreed upon by StudyGroup and RUG, provide the degree preparation education at the ISC and will coordinate the provision of accommodation to students for the duration of the programme.
  4.
    1. StudyGroup will take care of general marketing, (financial) administration, registration, teaching & quality assurance for the ISC programmes, with the exception of the items listed under point 8.
    2. StudyGroup will ensure that students are insured properly.
  5. Students will be directed to the ISC programmes via two main sources:
    - a.) Marketing and sales activities of StudyGroup. StudyGroup will liaise with RUG's marketing staff with the aim of jointly coordinating marketing and sales activities.
    - b.) Active referral from RUG during their marketing and admissions process.
  6. Marketing and branding of the partnership and programmes:
    - a.) StudyGroup will market and brand the specific collaboration between the ISC and RUG in a way that reflects the agreed collaboration in the collaboration agreement.
    - b.) RUG will provide information about the institution for marketing purposes and agrees to the appropriate use, according to the guidelines of RUG, of name and University logo in the ISC brochure.
    - c.) The current agreement involves no commission paid per enrolled degree student recruited via StudyGroup's general marketing and sales activities. For these general recruitment activities StudyGroup can provide no guarantees regarding recruited student numbers for RUG. Both parties have discussed the option of additional specific RUG promotion and mutually set multi-year recruitment targets in exchange for a commission paid per successfully recruited and progressed student. This option will be further explored during the initial year of collaboration.
  7. Whenever appropriate RUG will facilitate the referral process by providing students with information about ISC programmes on its website, in its marketing materials and during its

admissions process. Applicants not directly admissible to RUG programmes will be made aware of the existence of the ISC programmes and will be encouraged to apply.

8. ISC and RUG will establish appropriate admission requirements and programme content as a basis for full recognition of ISC programmes by RUG. Procedural aspects related to admissions and enrolment will be described in a separate workflow document.
9. Both parties will agree on the learning outcomes and examination structure of the Foundation Year Programme. Admission of the students to the degree programme is based on the Foundation Year examination results. Evaluation of the programme contents will take place annually. Improvements agreed on by both parties will be implemented accordingly.
10. When appropriate, RUG will issue timely conditional admission offers, to prospective degree students admitted to the ISC and take care of 'voorbereidend jaar' (Foundation year) visa applications for 'their' students in the ISC. The final admission will take place at the condition that students complete the Foundation Year successfully, based on the programme contents and examination structure the parties have agreed upon as illustrated in article 9.
11. The ISC will cover all costs related to the financial liability of RUG that is part of the student's visa application, in the unlikely event that RUG is found financially liable for a student during his or her stay at the ISC. The ISC will immediately inform RUG if a students' participation in the programme discontinues or changes.
12. All parties involved in this collaboration agreement will fully adhere to the Dutch *Code of Conduct International Students* and will conduct their collaboration and activities in a way that avoids harm to the reputation to the partners as well as the Dutch HE sector in general.
13. The ISC will always encourage students to progress to the University of their initial choice.
14. The cooperation between the ISC and RUG is complementary to existing programmes and partnerships for degree preparation education, specifically the pre-university college operated by RUG. Other degree preparation education provided by a commercial third party will remain exclusive to Study Group for the duration of this collaboration agreement.
15. This Collaboration agreement will enter into force after the last signature of this agreement. The collaboration will be evaluated in the year after the first ISC students have progressed to the RUG degree programme in September 2014. If both parties are satisfied with the progress the collaboration will be extended for a minimum period of three (3) years. Failure to meet the guidelines of the Dutch Code of Conduct or a serious breach of the other terms and conditions of the collaboration agreement can be reason for termination of the agreement with immediate effect. When terminating the collaboration agreement all parties agree to ensure that any students who have confirmed participation, or have already enrolled onto a programme of the ISC should be able to complete the ISC programme as planned and progress to the degree programme of RUG unless there are compelling reasons not to allow this.
16. This collaboration agreement contains all the terms which RUG and ISC have agreed in relation to their subject matter, and supersedes all prior written or oral agreements, representations or understandings between RUG and ISC relating to that subject matter, including the agreement between the ISC and the Faculty of Economics and Business of RUG.
17. This collaboration agreement shall be governed by and construed in accordance with the laws of the Netherlands.  
Any dispute that arises from or is in any way related to this collaboration agreement shall be subject to the exclusive jurisdiction of the competent court of the Netherlands.

We, the undersigned have read and agree to adhere to above terms and conditions of this collaboration agreement.

### **Signatories**



Signed for and on behalf of:  
Study Group (Netherlands B.V.)

Signed for and on behalf of:  
University of Groningen

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X  
X

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Prof. dr. Sibrand Poppema  
President

Date:

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Date:

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## **ANNEX I**

Faculties of the University of Groningen to which this Collaboration agreement applies:

### **Faculty of Economics and Business**

Nettelbosje 2  
9747 AE Groningen  
The Netherlands

### **Faculty of Mathematics and Natural Sciences**

Nijenborgh 9  
9747 AG Groningen  
The Netherlands

Geacht College van Bestuur,

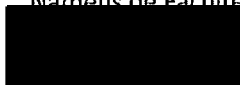
Zoals o.a. besproken tijdens het bezoek van de Rector aan FEB en FWN (in het kader van zijn rondgang langs de faculteiten voor overleg over internationalisering, zie ook O&S/IR memo 13/12358, Faculty plans and meetings about internationalisation), werken FEB (sinds academisch jaar 2013-2014) en FWN (sinds academisch jaar 2014-2015) samen met het Holland International Study Centre (ISC), onderdeel van Study Group. ISC verzorgt een in nauw overleg met de faculteiten ontwikkeld "pre-university Foundation Programme" voor internationale kandidaten voor de Engelstalige bachelor programma's van FEB en FWN, die niet rechtstreeks toelaatbaar zijn omdat sprake is van deficiënties in hun middelbare school opleiding. Deze kandidaten kunnen zich door succesvol het 1-jaarige Foundation Programme af te ronden alsnog kwalificeren voor toelating tot het gewenste FEB/FWN bachelor programma. Daarbij is de inhoud van het Foundation Programme aangepast aan de specifieke vereisten van het gewenste RUG bachelor programma.

Op dit moment biedt het ISC dit Foundation Programme aan in Amsterdam. ISC heeft aangegeven dat men er vanuit gaat dat als de belangstelling voor het Groningse Foundation Programme voldoende groot is, het mogelijk zal zijn om een ISC vestiging in Groningen te openen. Die optie lijkt reëel, er is veel belangstelling voor het FEB en het FWN Foundation Programme en er wordt onderzocht of ook voor andere RUG faculteiten met internationale bachelor programma's een dergelijk Foundation Programme kan gaan worden aangeboden. Onlangs heeft een delegatie van Holland ISC/Study Group een bezoek gebracht aan de Rector. Bovendien is ondertussen ook de Hanzehogeschool Groningen in overleg met ISC over het aanbieden voor een Foundation Programme voor hun internationale opleidingen.

Het eerste contact met ISC is tot stand gekomen via FEB. Op dit moment is er een overeenkomst tussen Holland ISC/Study Group, goedgekeurd door het FEB faculteitsbestuur. Nu ook het faculteitsbestuur van FWN de samenwerking met Holland ISC/Study Group heeft goedgekeurd en er in de toekomst mogelijk andere faculteiten zullen aansluiten, lijkt het ons beter om een Memorandum of Understanding op RUG niveau te sluiten. Ook gezien de invoering van de wet Modern Migratiebeleid is het ons inziens verstandig om een overeenkomst op RUG niveau te tekenen, omdat voor Foundation Programme studenten door de RUG een voorwaardelijke toelating wordt afgegeven en (indien nodig) een visum wordt aangevraagd, ten behoeve van deelname aan een voorbereidend jaar. Wij verzoeken het CvB dan ook om haar goedkeuring te verlenen aan het opstellen en ondertekenen van een Memorandum of Understanding tussen RUG en Holland ISC/Study Group.

Bijgesloten vindt u een voorstel voor zo'n MoU. De tekst van deze MoU is gebaseerd op de FEB overeenkomst met ISC/Studygroup. Daaraan is artikel 1 toegevoegd om ons de mogelijkheid te bieden om te specificeren voor welke RUG faculteiten de overeenkomst wel/niet geldt. De Annex kan worden aangepast als er wat dat betreft iets veranderd, bijvoorbeeld als een andere faculteit ook met ISC gaat werken. Artikel 15 is toegevoegd om aan te geven dat met deze RUG overeenkomst de FEB overeenkomst zal komen te vervallen.

Namens de Faculteit Economie en Bedrijfskunde,



Namens de Faculteit Wiskunde en Natuurwetenschappen





university of  
 groningen

DIV (Documentaire Informatie Voorziening), FA <div@rug.nl>

**Fwd: Fwd: Study Group samenwerkingsovereenkomst: instemming van  
 FEB 10-06-2016**

1 bericht

[Redacted]

Aan: "div@rug.nl" <div@rug.nl>

Goedemorgen,

[Redacted] de e-mail moet worden ingeboekt.

[Redacted]

----- Doorgestuurd bericht -----

[Redacted]

Datum: 10 juni 2016 11:46

Onderwerp: Study Group samenwerkingsovereenkomst: instemming van FEB 10-06-2016

Aan: [Redacted]

Cc: [Redacted]

[Redacted]

DOCUMENTAIRE INFORMATIE	13 Juni 2016 08:33
VOORZIENING RUG	
<b>INGEKOMEN</b>	
13 JUNI 2016	
CLASS.NR. : .02.17	
DIENST/AFD.: abj2/bbd	
CORR.NR. : 16/06143	

Samenwerkingsovereenkomst met Study Group

Geacht College,

Het Bestuur van de Faculteit Economie en Bedrijfskunde gaat akkoord met de aangepaste versie van het Collaboration Agreement Studygroup – University of Groningen van de samenwerkingsovereenkomst met Study Group, de organisatie die voor FWN en FEB het foundation year verzorgt.

Met vriendelijke groet,  
namens het Bestuur van de Faculteit Economie en Bedrijfskunde,

[Redacted]

secretaris bestuur

[Redacted]

bestuurssecretaris College van Bestuur, College van Decanen, Managementberaad en Raad van Toezicht

Rijksuniversiteit Groningen

Bureau van de Universiteit  
Bureau Bestuur & Directie

Oude Boteringestraat 44

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08 DEC. 2016

CLASS.NR. : 0723  
DIENST/AFD.: abjz  
CORR.NR. 16/14279

## **COLLABORATION AGREEMENT STUDYGROUP – UNIVERSITY OF GRONINGEN**

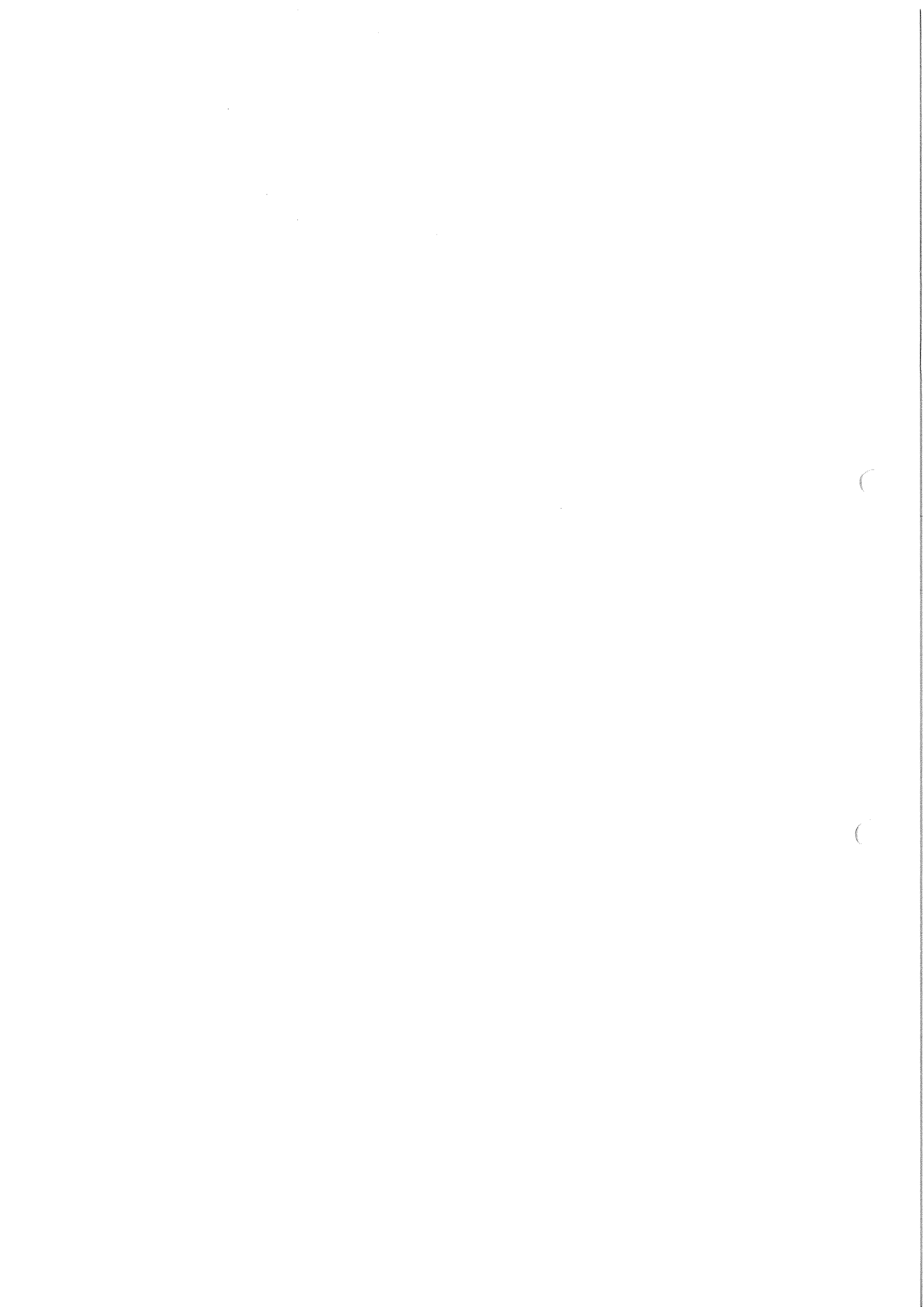
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**and**

**StudyGroup (Netherlands BV), herewith represented by James Pitman, situated at 1 Billinton Way, Brighton BN1 4LF, United Kingdom, hereafter referred as “StudyGroup”;**

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  2. StudyGroup operates an ISC in Amsterdam located on Piet Heinkade 55. The premises provides StudyGroup with the teaching and study infrastructure required to successfully operate the ISC. All ISC students (hereafter “Students”) will be offered accommodation in The Student Hotel or alternative accommodation provided by other student accommodation providers.
  3. StudyGroup will, as agreed upon by StudyGroup and RUG, provide the degree preparation education at the ISC and will coordinate the provision of accommodation to students for the duration of the programme.
  4.
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    - c.) The current agreement involves no commission paid per enrolled degree student recruited via StudyGroup’s general marketing and sales activities. For these general recruitment activities StudyGroup can provide no guarantees regarding recruited student numbers for RUG.





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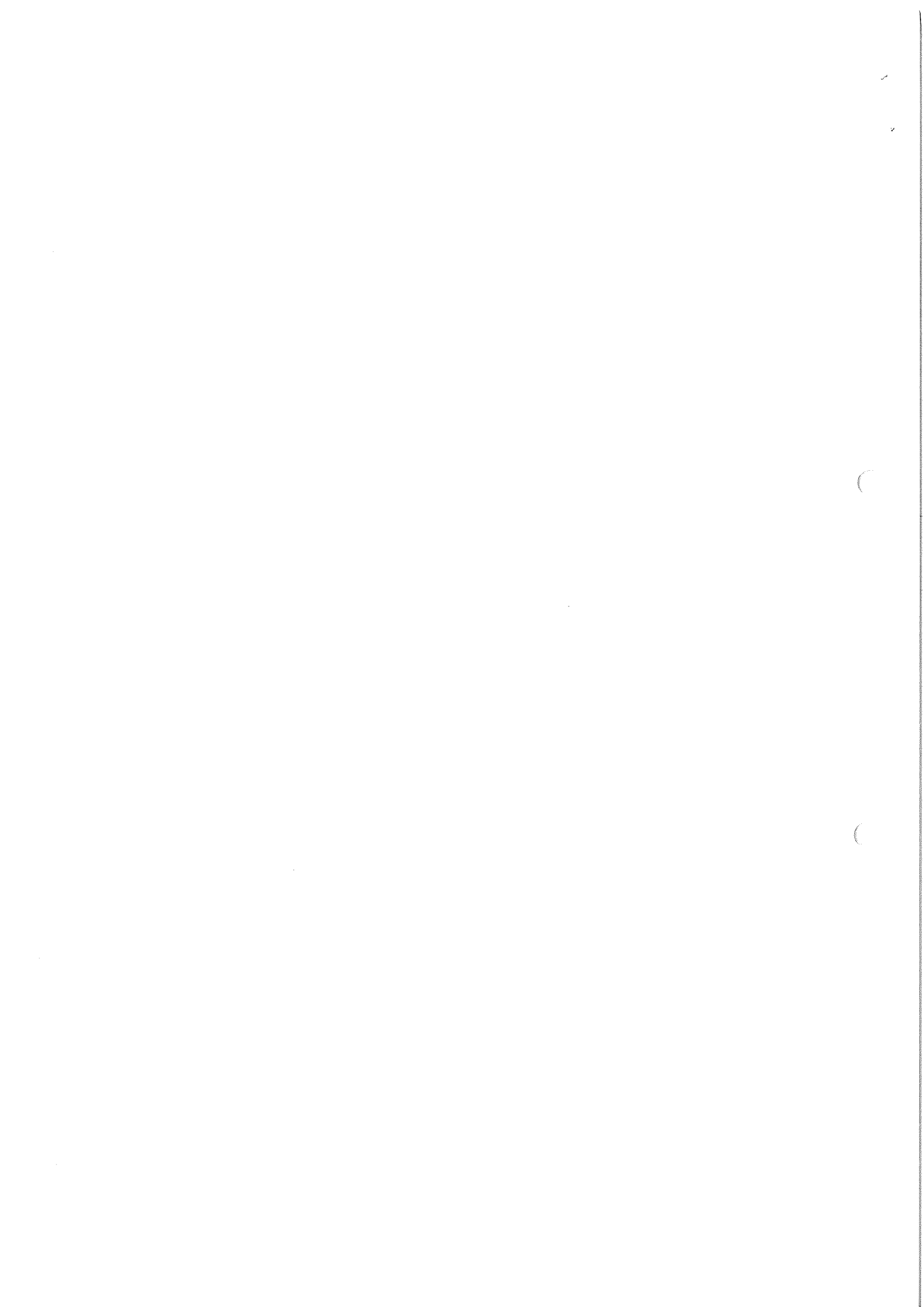
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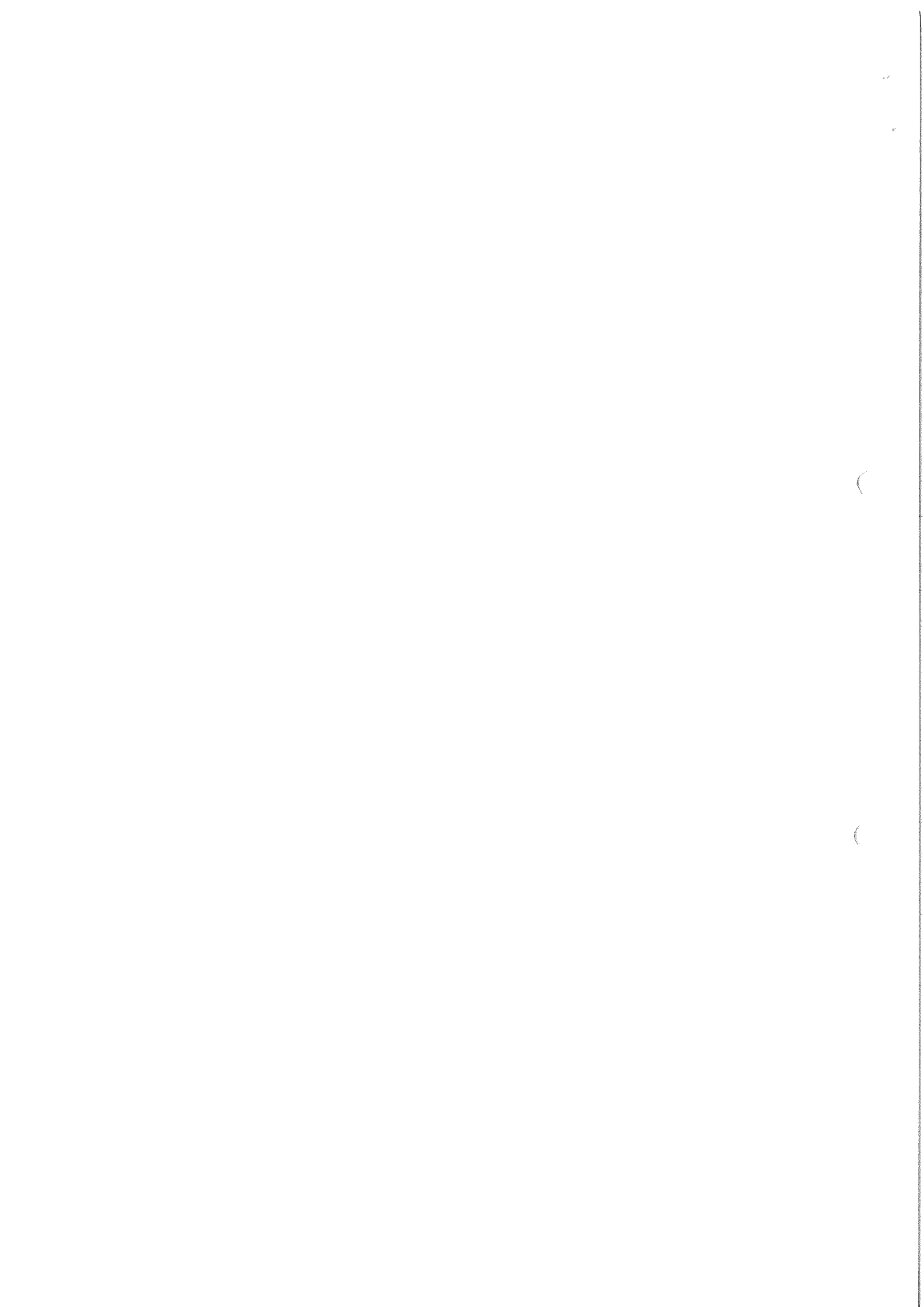
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11. The ISC will cover all costs related to the financial liability of RUG that is part of the student's visa application, in the unlikely event that RUG is found financially liable for a student during his or her stay at the ISC. The ISC will immediately inform RUG if a student's participation in the programme discontinues or changes.
12. All parties involved in this collaboration agreement will fully adhere to the Dutch *Code of Conduct International Students* and will conduct their collaboration and activities in a way that avoids harm to the reputation to the partners as well as the Dutch HE sector in general.
13. The ISC will always encourage students to progress to the University of their initial choice.
14. The cooperation between the ISC and RUG is complementary to existing programmes and partnerships for degree preparation education, specifically the pre-university college operated by RUG. Other degree preparation education provided by a commercial third party will remain exclusive to Study Group for the duration of this collaboration agreement.
15. This Collaboration agreement will enter into force on 1 September 2014 for a period of four years.. The collaboration will be evaluated annually during the duration of the collaboration agreement. Extension will take place by signing an updated collaboration agreement, three months before the end date of the initial agreement, at the latest. Failure to meet the guidelines of the Dutch Code of Conduct or a serious breach of the other terms and conditions of the collaboration agreement can be reason for termination of the agreement with immediate effect. When terminating the collaboration agreement all parties agree to ensure that any students who have confirmed participation, or have already enrolled onto a programme of the ISC should be able to complete the ISC programme as planned and progress to the degree programme of RUG unless there are compelling reasons not to allow this.
16. This collaboration agreement contains all the terms which RUG and ISC have agreed in relation to their subject matter, and supersedes all prior written or oral agreements, representations or understandings between RUG and ISC relating to that subject matter, including the agreement between the ISC and the Faculty of Economics and Business of RUG.



17. This collaboration agreement shall be governed by and construed in accordance with the laws of the Netherlands.


Any dispute that arises from or is in any way related to this collaboration agreement shall be subject to the exclusive jurisdiction of the competent court of the Netherlands.

We, the undersigned have read and agree to adhere to above terms and conditions of this collaboration agreement.

### Signatories

Signed for and on behalf of:  
Study Group (Netherlands BV)

Signed for and on behalf of:  
University of Groningen



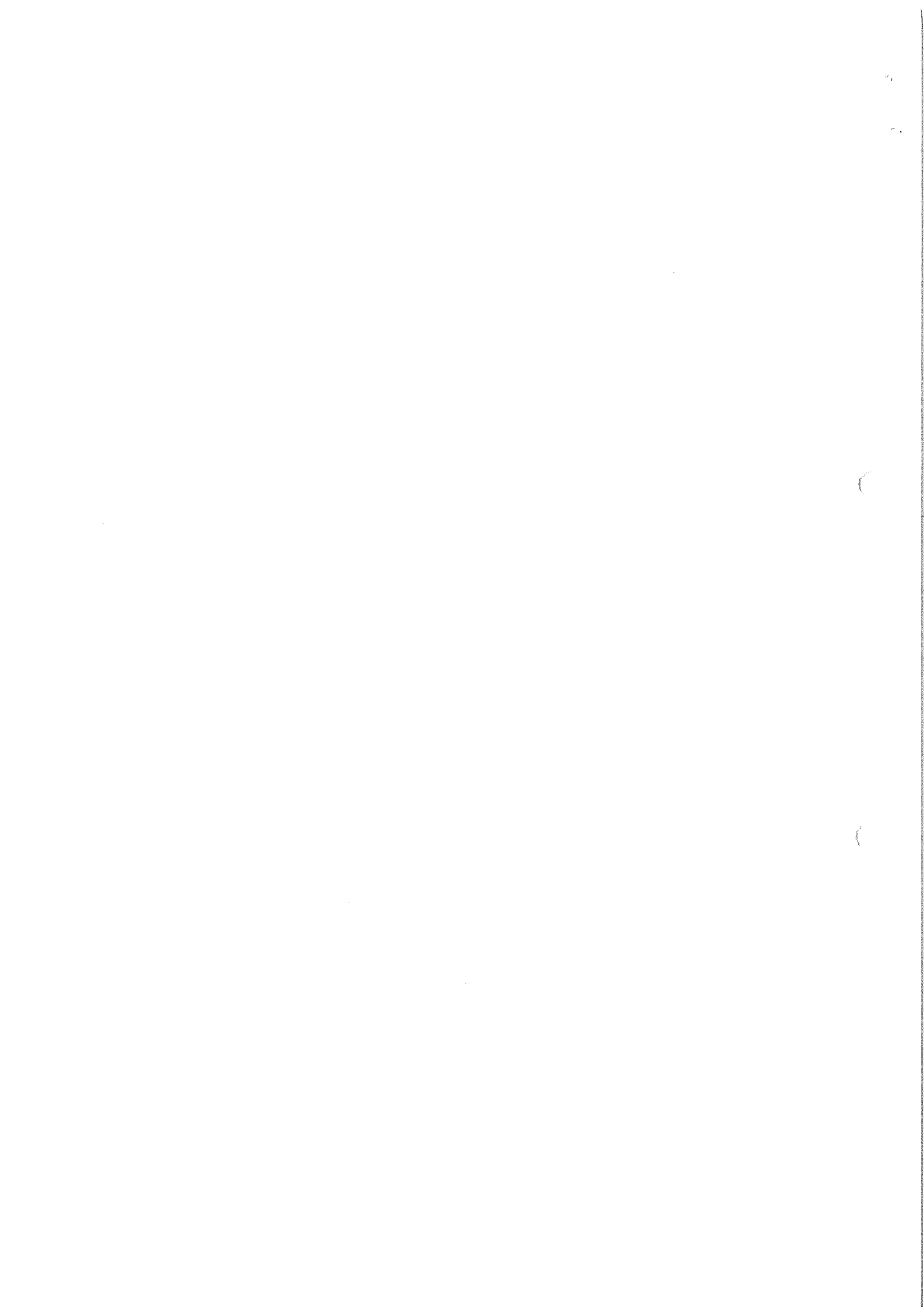
Managing Director, Higher Education UK  
and Europe



Prof. dr. Sibrand Poppema  
President

Date: \_\_\_\_\_

Date: 15-06-2016



## **ANNEX I**

Faculties of the University of Groningen to which this Collaboration agreement applies:

### **Faculty of Economics and Business**

Nettelbosje 2  
9747 AE Groningen  
The Netherlands

### **Faculty of Mathematics and Natural Sciences**

Nijenborgh 9  
9747 AG Groningen  
The Netherlands







## briefing note

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	Confidential
Meeting	Board of the University
Meeting date	24 April 2017
Subject	Review agreement between UG and Study Group
Corsa number	17/04372
Department	ISR
Handling advice	for approval
Summary (maximum of 10 lines)	A review of the arrangements between the UG and Study Group (UK) including details of academic progression at both FEB and FSE as well as additional documents of interest. ABJZ: Supports ISR's recommendations that a review of the agreement and strategy is needed. OSK, Comm and F&C: Support the memo's conclusion
Financial implications	NA
If yes, coverage:	
ICT implications	
Suggested decision/Advice	TBC
Follow up	<input checked="" type="checkbox"/> Committee of Deans <input type="checkbox"/> Board of the University <input type="checkbox"/> Management Council <input type="checkbox"/> University Council <input type="checkbox"/> Supervisory Board <input type="checkbox"/> Faculty Boards <input type="checkbox"/> Local Consultative Committee <input checked="" type="checkbox"/> other: relevant faculties
Communication	<input type="checkbox"/> internal <input type="checkbox"/> external



To  
 Board of the University

From  
 [REDACTED]

Confidential

Date  
 24 April 2017

Subject  
 ISR Memo for CvB - Review and Recommendations - Agreement between the University of Groningen and Study Group.

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ISR Memo for CvB

## Review and Recommendations

### *Agreement between the University of Groningen and Study Group*

**Recommendation:** ISR has significant concerns around the current agreement and arrangement with Study Group. In essence, most of the benefit from the association accrues to Study Group, while the majority of the direct and implied risk sits with UG. There are significant opportunities within the pathway sector for a university of our stature and reputation, however, our engagement with pathway providers should align with our long-term goals and not be dictated by a commercial partner with differing goals from our own. The current agreement between Study Group and UG began on September 1 2014 and runs for four years, expiring on August 31 2018. ISR does not, under the current terms, support renewal of the existing university-wide agreement with Study Group.

Three possible options for the future are presented below for the Board's consideration. Each option would be an improvement on the current situation, however, ISR recommends *Option C* as the best opportunity to retain total control over academic quality as well as the university's reputation and global outreach. ISR requests board approval for a feasibility study to be completed on a UG Foundation/Pathway model.

## memo

<p><b><u>Option A: Renegotiate Current Agreement</u></b></p> <p>That UG renegotiate a new agreement with Study Group (for a period to be determined) which enables them to continue the provision of pathways into UG programs and that any agreement would exclude recruitment of students from a list of countries determined by the UG and communicated to Study Group.</p> <p><b><i>Follow-Up: Discussion on agreement renegotiation to begin with relevant UG stakeholders</i></b></p>
<p>Opportunities:</p> <ul style="list-style-type: none"><li>• Would allow us to benefit from the improvements Study Group argues they are making</li><li>• Enables UG to set diversity targets and realistic expectations around recruitment outcomes</li></ul> <p>Risks:</p> <ul style="list-style-type: none"><li>• Study Group does not wish to renew an agreement that restricts their ability to act in their commercial interests</li></ul>
<p><b><u>Option B: Open Tender Process for New UG Pathway Provider</u></b></p> <p>That UG establish a process and call for a competitive (including Study Group) public tender for the provision of defined pathway provision and recruitment services. That these pathways would be for a variety of current and future UG bachelor programs across a range of UG faculties.</p> <p><b><i>Follow-Up: Tender process and timeline developed with relevant UG stakeholders</i></b></p>
<p>Opportunities:</p> <ul style="list-style-type: none"><li>• Would enable a university-wide conversation about which Faculties wish to implement pathways</li><li>• Enables the university to set recruitment expectations and diversity guidelines for the pathway cohort (via the tender) ensuring transparency for all</li><li>• A competitive process should encourage pathway providers to offer service-level agreements above standard to ensure success, raising long-term quality and allowing for easy agreement maintenance</li></ul> <p>Risks:</p> <ul style="list-style-type: none"><li>• Poor quality, low number or no submissions in response to the tender process due to UG imposed restrictions</li><li>• Time needed to embed new pathway provider into the Groningen system may require a short-term extension of the Study Group agreement</li></ul>
<p><b><u>Option C: Develop a UG Foundation/Pathway Program</u></b></p> <p>That UG renegotiate the current agreement with Study Group (as per Option A) for a period of two years with a view to implementing our own pathway programs (eg: <i>Appendix H Kings College</i>) under a University of Groningen Preparation/Foundation model.</p> <p><b><i>Follow-Up: Completion of a detailed proposal (ISR, OSK, F&amp;C and Faculties) on a proposed educational model, resources and investment required for UG Foundation programs</i></b></p>
<p>Opportunities:</p> <ul style="list-style-type: none"><li>• Would enable a university-wide conversation about which UG Faculties wish to implement pathways</li><li>• Ensure UG's total control academic quality/diversity of the pathway cohort and our reputation</li><li>• Allow the UG to present a comprehensive educational offering (possibly including English language provision) to the world which could then be offered here in Groningen, Yantai or elsewhere.</li></ul> <p>Risks:</p> <ul style="list-style-type: none"><li>• Significant investment (time/budget) required</li></ul>

### **Pathway Providers**

Pathway providers are loosely defined as “private third-party entities partnering with institutions to recruit international students and offer English-language preparation with academic coursework” (*NAFSA 2016*)

While pathway programmes are a recent phenomenon, they are a segment of the higher education sector that has shown significant levels of growth over the last decade and are now a global industry estimated to be worth over \$US1.4 billion annually (tuition fees only) and with more than 2000 programs in operation (*Studyportals Report – Sept 2016*).

Nearly half of all global foundations are delivered by six providers; **Study Group, Cambridge Education Group, INTO University Partnerships, Navitas, Shorelight and Kaplan International Colleges** while another 25% of Foundation programs worldwide are delivered by universities themselves. *Studyportals* suggests that UK pathway providers account for around 60% of the global total of pathway delivery with Oceania (16%) and Nth America (12%) some way behind, however, US based colleges are becoming more important, largely due to the number of US colleges entering the international recruitment space. The general view in the HE sector is that the opportunities for future growth by commercial pathway providers is likely to be in two main areas, Europe (due to increasing English-language provision) and the USA (the sheer size of the available market)

### **Why Pathways:**

There are varied reasons that universities make arrangements with pathway providers;

- Allows universities to access global student recruitment channels without significant investment or resources
- Access to a ready pool of candidates that may not have sufficient prior academic knowledge or qualifications to enter the university directly
- Offers profiling opportunities to lower ranked institutions who are unable to attract large numbers of students through their own reputation
- Enables universities to quickly increase the number and diversity of international students through the outsourcing of recruitment and academic delivery
- Able to develop feeder streams in particular locations of interest; branch campuses or institutional partnerships in other countries
- Ease students into local life and assist in their acclimatization to local culture, language, learning styles and living conditions prior to arrival at university, thus increasing retention rates in degree programs
- Able to design curriculum with the target program in mind and often in conjunction with the target program academics which should help to overcome the risk of admitting incoming students without adequate preparation or skills.
- Should ensure that all commencing degree students, despite their previous study, have similar academic knowledge and language skills

### **Problems with Pathway Providers**

- Pathway providers, as commercial organisations seeking economies of scale, prioritise countries with strong demand for international education meaning China, and to a lesser extent India, are overrepresented in pathway provider student cohorts
- They recruit students via extensive international representative/agency networks, which can affect institutional reputation
- Expensive tuition fees compared to the destination program, eg: UG-IFY 2017/18 Fee: EUR16,900 which can lead to a ‘pay-for-pass’ and ‘guaranteed pathway’ culture
- The quality (as determined by results in prior education) of the student cohort is lower than that of regular university applicants who can access university programs directly

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- Pressure to ensure good levels of progression from the pathway program to the destination university can lead to a very supportive pathway program designed to increase student success. If this support is not replicated at the destination university student success rates can suffer.
- Reputational risk as those students who gained entry directly through academic excellence find themselves in programs with classmates who came via a pathway provider

### **Background: Study Group**

“Study Group is a privately owned education provider that operates across three geographically distinct higher education divisions globally: the UK, Australia and North America. Within the International Study Centre unit, there are currently 17 dedicated centres that prepare international students for entry to higher education institutions (HEIs) in the UK and Europe at both undergraduate and postgraduate levels.” *QAA Review 2016*

Within the Netherlands, Studygroup (via the Holland International Study Centre (HISC) provides pathway programs for **University of Groningen** as well as **Hanze University of Applied Sciences, The Hague University of Applied Sciences, Tilburg University, University of Twente, Vrije Universiteit Amsterdam** and **Wittenborg University Amsterdam**.

“In September 2016 the Holland ISC opened a second centre on-campus at the University of Groningen and Hanze University of Applied Sciences. Students who study here will be preparing for degrees at one of the two universities on-campus and will be part of university life while they are at the ISC.” <http://corporate.studygroup.com/higher-education/netherlands/holland-international-study-centre>

#### *Study Group Key Contacts:*

 Managing Director, UK & Europe.  
 Director, Holland International Study Centre  
 ISC Partnership Director - Europe

### **Study Group & University of Groningen**

Currently Study Group provides pathway programs to the following University of Groningen Degrees:

<i>Business and Management route (taught in Groningen):</i>	<i>Science and Engineering route (taught in Groningen):</i>
<u>BSc International Business</u> <u>BSc Economics and Business Economics</u> <u>BSc Econometrics and Operations Research</u>  <a href="https://www.hollandisc.com/partner-universities">https://www.hollandisc.com/partner-universities</a>	<u>BSc Applied Mathematics</u> <u>BSc Applied Physics</u> <u>BSc Artificial Intelligence</u> <u>BSc Astronomy</u> <u>BSc Chemical Engineering</u> <u>BSc Chemistry</u> <u>BSc Computing Science</u> <u>BSc Industrial Engineering and Management</u> <u>BSc Mathematics</u> <u>BSc Physics</u>

Other UG faculties (Law, Arts) have expressed interest in implementing Pathway programmes via the Study Group agreement.

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*Relationship Management UG to Studygroup (as at Feb 1 2017):*

Ongoing Relationship Management/Marketing & Recruitment Activities: [REDACTED]

Head of Marketing

Review of current arrangements and agreement [REDACTED] Head of International Strategy & Relations

Faculty of Economics & Business [REDACTED] & FEB academic staff

Faculty of Science & Engineering: [REDACTED] & FSE academic staff

### **Report: Faculty of Science and Engineering (FSE) & Study Group (Appendix C)**

The document reports on the Science Foundation Year (SFY) two years after its introduction at FSE. The report notes the following;

- No indication that Study Group is yet able to yield a stable, good-quality intake for FSE
- Study Group recruitment strategies appear to significantly affect the quality of the students
- Study Group priority countries for FSE; South Korea, Russia, Ukraine, China, Bangladesh, Pakistan, Thailand and various countries in Latin America
- First SFY cohort was poor to very poor (62% dropout during SFY and 50% dropout in 1<sup>st</sup> BSc year)
- Pathway students indicated problems with fast-paced study and heavy workload in 1<sup>st</sup> year
- Second SFY cohort has shown a relative improvement in quality, third cohort will be key
- Assessment of the program has led to agreement of the following targets
  - Drop-out from 1<sup>st</sup> BSc year should not exceed 33%
  - Increased selectivity in admissions and recruitment
  - Comparable workload in SFY to 1<sup>st</sup> BSc year
  - Informal cap of 20% of SFY intake from China
- Maintenance and management of the SFY requires significant commitment from Faculty stakeholders and the current recruitment and quality return does not appear to justify the time invested

### **Report: Faculty of Economics and Business (FEB) & Study Group (Appendix D & E)**

The report details the experiences of the faculty since the initial intake of IFY students in September 2014. The document notes the following;

- The first cohort saw around 5 out of 9 successfully complete IFY, 4 entered 1<sup>st</sup> year with 3 of those 5 progressing to second year
- For the second cohort, 25 of 30 IFY students successfully completed with 23 entering 1<sup>st</sup> year.
  - Quality concerns were raised in first semester
  - Quality did not improve in second semester
  - Only 7 of the 23 met the BSA requirement
- Issues raised with the transfer from a 'supported' IFY environment to UG academic environment
- A number of improvement measures have been implemented
- Informal cap of 20% of IFY intake from China

### **Study Group Response**

At a meeting on March 10 2017, [REDACTED] and [REDACTED] met with [REDACTED] and [REDACTED] of Study Group to discuss UG's concerns around the success and service of the existing agreement with University of Groningen. During a wide-ranging discussion, Study Group undertook to provide written details of their improvements in academic progression and strategic recruitment, these can be seen at *Appendix A & B*.

The Study Group response provides the following details;

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- Varied actions taken to improve academic quality
  - QAA UK structure implemented under QAA Review 2016 (*Appendix H*)
  - Changes in English modules content and assessment of Mathematics modules
- New teaching location in Groningen will improve conversion and integration of IFY & SFY students
- Launch of separate Hanze-IFY track will improve progression to Groningen and lift our student quality
- Varied actions taken to improve the quality of recruitment
  - Raised entry requirements for English along with Maths and Physics
  - Informal nationality cap (no more than 25% of one nationality in one SFY or IFY cohort)
  - Strategic recruitment from Russia and Latin America

The response also notes the success of a Study Group – VU Amsterdam Pilot program to provide coordinated study support for students who have progressed from a pathway program and recommends Groningen implement a similar program.

### **Review of Current Arrangements and Agreement:**

With 18 months left in the life of the agreement between UG and Study Group, this is an excellent opportunity to review the current state of play and examine options and opportunities for the University's engagement with the pathway sector.

**Academic Quality & Progression:** While it's understandable that students with lower academic attainment prior to university would have difficulty adjusting to a university study environment, this is precisely the reason that universities and prospective students choose to work with expert pathway providers. ISR believes it is reasonable to expect that a pathway provider be able to adequately prepare students for the transition to university study and that those students enjoy similar levels of success to their direct-entry counterparts. Given the tuition-fee for 2017/18 is quoted at EUR16,900 it's also reasonable to assume that Study Group students have similar expectations.

**Location:** The International Study Centre, Groningen is based at Zernikepark 4, 9747 AN, Groningen. Additional research needs to be done on the conditions of any lease (faculty based or Hanze) that is held by Study Group. For any future lease, the terms of the recent CvB-approved *Huurbeleid* should apply.

**Student Support:** Study Group cites a pilot study at VU Amsterdam in providing additional support (Study Group funded and coordinated) for their pathway students on entry into university. If Study Group wishes to offer such a service to the students who have progressed to UG via their pathway that may be useful, however, ISR does not support such a plan being coordinated through UG Faculties as it sets up discrepancies in equity of access and available support between enrolled UG students.

**Reputational Risk to UG:** One of the risks in working with an external pathway provider is that the university hands over its brand and reputation to a commercial organisation which may have substantially different goals and may in some cases work in direct opposition to the client university's strategy. ISR and International Marketing have significant concerns over a number of areas in Study Group's operations

- **Commercial Education Agents:** Over the previous few years, UG has considered its position with regard to the use of commercial agents and representatives and in late 2016, the CvB adopted a measured policy for the approval and opening of some global markets (less than 10) to the operation of agents and this policy is now being implemented by International Marketing. Study Group proudly states that it works with a network of 2500 education agents globally. This creates a significant disconnect between our agency policy and the real world operations of our pathway provider.



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- [REDACTED]
- **Reputation of the quality of International Students:** As a result of its highly selective recruitment policy and focus on quality, UG has never had a significant problem with the reputation for quality of our international students. Pathway students within FSE and FEB are not identified to their university lecturers but the poor study success of the incoming pathway cohorts risks the overall reputation for academic quality of our international students, especially Chinese students, which is of particular concern given the university's ambitions for UGY.
  - **Nationality Cap:** In response to the concerns about the size of the Chinese student cohort (*Appendix E: 26 out of 39 of the FEB IFY intake in 2016/17 were from China*), Study Group has agreed to a nationality cap to ensure that no one nationality dominates. There is however confusion around the exact percentage, with both UG Faculties quoting a figure of 20% while Study Group notes a cap of 25% and has stated 30% verbally. Aside from the exact figure, [REDACTED]
  - **A Pathway to the Hanze:** Significant numbers of the initial IFY and SFY cohorts that were not successful in achieving UG entry were directed to and enrolled at the Hanze. Study Group has recently introduced a stand-alone Hanze track which will allow for some marketing and promotion separation with UG, however as Study Group states in their response (*Appendix A*)

“Launch of separate track for Hanze IFY: 2 terms with January start and **lower fee** and entry requirements. This will diversify the recruited students at starting point while also **providing the opportunity to transfer weaker September students to the Hanze track per January.**”

ISR has concerns that the UG brand is being used as the driver for poor-quality applicants with Hanze as the implied back-up institution. This situation is of no benefit, and considerable risk, to the UG brand.

Appendix:

- A) Groningen Report from Study Group
- B) Groningen Students Study Group\*
- C) Foundation Year at FSE 21022017
- D) Experiences FEB with the Study Group IFY, Feb 2017
- E) Holland ISC IFY to FEB cohorts results\*
- F) Study Portals – Cambridge English, Routes to Higher Education Report
- G) Study Group Agreement November 2016
- H) Kings College London International Foundation Brochure (Sept 2016)

\*all student names and IDs have been removed



#### Actions taken to improve quality of progressed students

- Strict policy for students retaking exams (per 2015-2016 IFY cohort)
- Changes to assessment of Mathematics modules, mirroring the assessment at the university (partially implemented for 2015 cohort and fully implemented for 2016 IFY cohort)
- Changes to English modules with increased focus on academic skills and coursework (per 2016 IFY cohort)
- Implementation of Quality Assurance structure including internal audits, centre reviews, programme reviews, external examiners, streamlined module descriptions with learning outcomes and relevant committees overseeing the above. This is coordinated by head office in UK in line with British QAA requirements (per 2016 IFY cohort)
- The new teaching location in Groningen allows for much more integration between the foundation students and the university during the foundation year. This will reduce the impact of progressing after foundation (implemented for the Science IFY cohort per 2016 and fully implemented for all Groningen students per 2017 IFY cohort)
- Launch of separate track for Hanze IFY: 2 terms with January start and lower fee and entry requirements. This will diversify the recruited students at starting point while also providing the opportunity to transfer weaker September students to the Hanze track per January. Overall progression to Groningen will increase as a result and so will the quality of progressed students (implemented per 2017 IFY cohort)

#### Actions taken to improve recruitment quality

- Raised entry requirements for English by adding IELTS sub scores (per 2015 IFY cohort)
- Raised and more specific entry requirements for mathematics and physics (per 2016 IFY cohort)
- Active cap management on nationality: no more than 25% of the same nationality in one cohort (partially implemented per 2015 IFY cohort and fully implemented per 2016 IFY cohort)
- Strategic recruitment in specific desired markets based on quality indicators: Russian speaking region, Korea and Ecuador (per 2017 recruitment cycle)
- Admissions process fully integrated with central Study Group processes resourcing and quality assurance (partially implemented per 2016 IFY cohort and fully implemented per 2017 IFY cohort)

#### VU University Amsterdam pilot

Study Group ran a pilot project with VU University in Amsterdam to offer Study Group coordinated and funded study support to students after they progressed from Foundation to University, in addition to the actions above. The cohort is relatively small but the results are statistically significant: out of 14 students 3 are likely not to pass the BSA norm. Moreover: their traditionally difficult module Business Mathematics shows the Study Group students outperforming VU's directly recruited international students (mostly EU). The results justify implementing a similar programme on a larger scale in Groningen.

### Strategic recruitment and diversity

In alignment with the diversity policy of the university the following growth in these strategic markets is currently recorded in the general Holland pipeline for the 2017 IFY cohort. This will have a strong reflection in the Groningen cohort and the growth is expected to continue. The focus has been to increase the student body from countries where academic quality is statistically high:

#### **Russian speaking region:**

Offers: 56% growth (from 16 to 25)

Confirmations: 125% growth (from 4 to 9)

The growth is a result of a continuous dedicated campaign in market. It is a challenging market due to financial constraints but efforts are paying off.

#### **Latin America:**

Offers: 1950% growth (from 2 to 41)

These offers are due to securing the prestigious SYNECYT government scholarship cohort which is awarded to the best 0,5% of the country. Most of these offers are expected to convert in confirmed students and the number will increase.

#### **China:**

No more than 25 students in the 2017 IFY Business cohort.

### 2016-2017 IFY nationality mix

The current IFY cohort reflects only partial implementation of the actions listed but the diversity mix has improved compared to 2015-2016. It is attached to your reference.

#### First graduate:



# The Foundation Year at the Faculty of Science and Engineering Report, February 2017

## Management summary

This document reports on the Science Foundation Year (SFY) two years after its introduction at the Faculty of Science and Engineering (FSE). The most relevant finding is that Study Group's recruitment strategy seems to affect deeply the students' quality. As the two first cohorts have performed rather differently from each another, there is at present no real indication yet of the fact that the programme will be able to yield a stable, good-quality additional international intake for FSE. The performance of the next cohort in the FSE first year will be crucial to assessing the reliability of this construction.

### 1. Programme features

Introduction of the programme into the FSE offer: September 2014.

Contents:

- 1) a (VWO+) science curriculum including Maths, Physics and Chemistry developed by FSE,
- 2) language+study skill module developed by Study Group.

Target group: prospective students for all the Science and Engineering Bachelor's programmes (one curriculum fits all) who are not eligible for direct admission (at present, virtually every country outside the EEA, with the exception of a number of selected high schools in Indonesia and China and of "international" schools). The nationality mix of the target group reflects the Study Group marketing policy. Starting from the 2016/17 cohort, FSE and FEB have required a 20% cap on Chinese students.

Priority countries (data Study Group 2016): South Korea, Russia, Ukraine, China, different countries in Central and Latin America, Bangladesh, Pakistan, Thailand.

Location: Holland International Study Centre (ISC), Amsterdam 2014 through 2016, Groningen, as of 1 October 2016 (Zernikelaan 4).

### 2. SFY Cohorts' progression

Table 1 illustrates the three SFY cohorts and the progression of the first two towards the FSE Bachelor's programmes (empty cells refer to data that for obvious reasons are not yet available).

SFY cohort	14/15	15/16	16/17
	21	38	42
SFY drop out rate	62%	42%	
	↓	↓	↓
FSE cohort	15/16	16/17	17/18
progression to 1st year	8	22	
active in 2nd year	4		
BSc drop out rate	50%		

Table 1

It is evident that a large proportion of the first SFY cohort consisted of poor to very poor students, which caused a drop out rate of 62% during the SFY and of 50% during the first BSc year. With the exception of a very strong Korean student and a rather good student from Venezuela, all other nationalities performed very poorly, in particular the students from Azerbaijan (refer to the next section and to Annex 1 for the exact composition of the cohort).

It is important to note that, in the case of the first SFY cohort, Study Group had applied admissions requirement below level for maths and physics, as the same requirements had been used for the SFY and the Business FY (two students from Saudi Arabia who left the SFY along the way, had had just one year of a very light physics programme in high school). The students who eventually succeeded in completing the SFY reported (along with their academic advisors at FSE) that they had been overwhelmed by the fast pace of the first year's teaching at FSE and that they lacked the necessary discipline and independent working attitude. Holland ISC staff attributed this to the small scale of the SFY classroom, the relatively low workload (as compared to the BSc) and to their reassuring daily support, which easily keep students in a sort of "comfort zone".

The figures relative to the drop out rate of the 2015/16 cohort indicate some improvement, which can also be observed in the students' progress during the FSE first BSc year (refer to Section 4 and Annex 2 for the earned credits). It is relevant to mention that, following the first SFY cohort, there had been a shift in the recruitment of specific nationalities (like the Azeri nationality) and that slightly stricter admissions requirement have been applied regarding the relevant science subjects in the high school records.

On a different note, a couple of students who completed successfully the SFY in both years eventually did not progress towards FSE but remained in Amsterdam. This kind of drop out is expected to disappear after the opening of the Groningen location in 2016.

### 3. Nationality mix

Figure 1 shows the most relevant nationalities per SFY cohort (a complete overview of all nationalities is to be found in Annex 1). Though the nationality landscape remains highly scattered, the bars indicate a concentration, starting from the second SFY cohort, in the Korean and Chinese nationality. If we consider that the cohort performance improved after the first cohort, we can assume these nationalities contribute to a higher student quality (confirmed by on individual average grades of those nationalities, data not shown). Russian students have also shown on average moderately good to good results, while the performance of other nationalities remains very variable, with several individuals situated in the lower range of the spectrum.

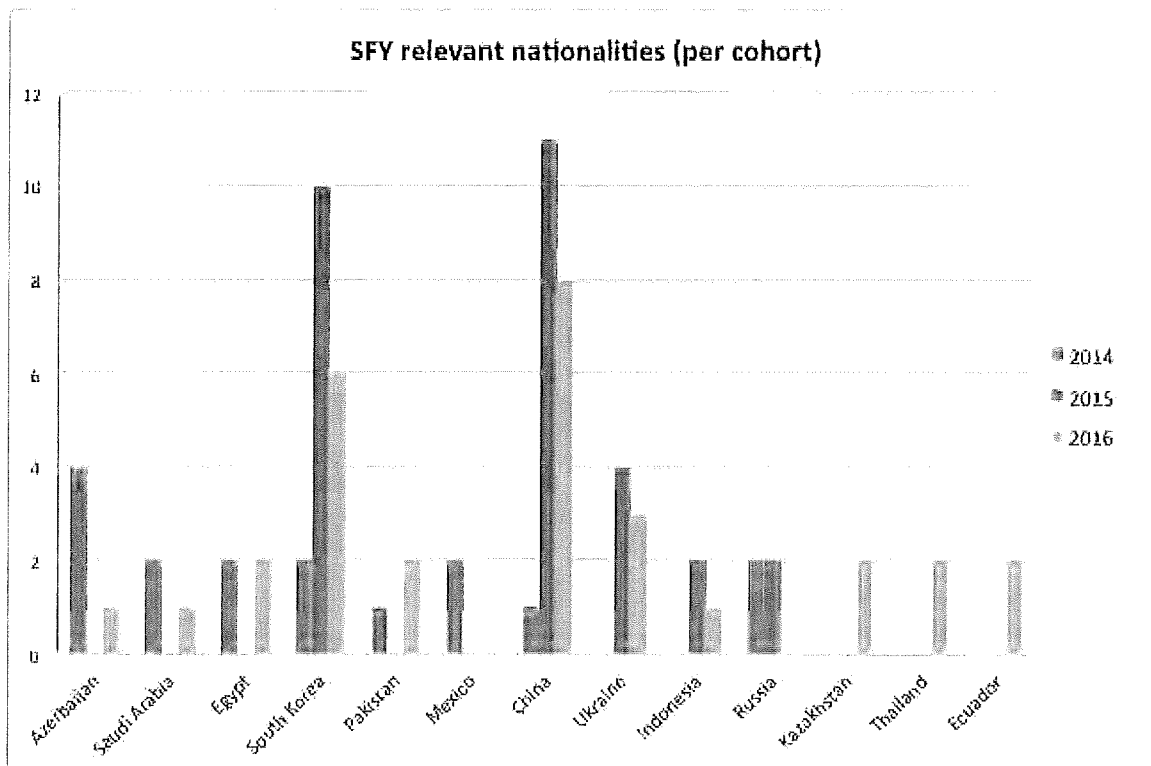


Figure 1. The most relevant nationalities for each SFY cohort.

#### 4. Students' progress

The graphs below report individual credits earned during the first year for the SFY students who progressed towards the BSc at FSE (the relative data are listed in Annex 2). As reported in the previous sections, the majority of the 8 remaining students of the first SFY cohort interrupted their studies because of a negative BSA (a number of students who received a negative BSA enrolled for another FSE programme and are therefore still active). However, the following cohort, as anticipated by the improved drop out rate during the SFY, seemed to be performing on an overall higher level.

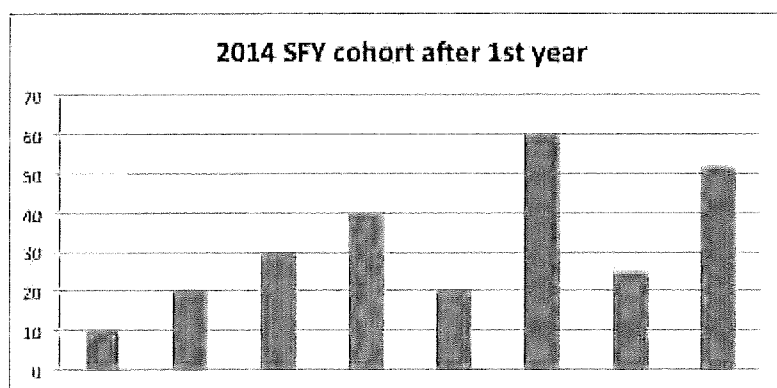


Figure 2. First year's credits, SFY cohort 2014, data Sept 2016.

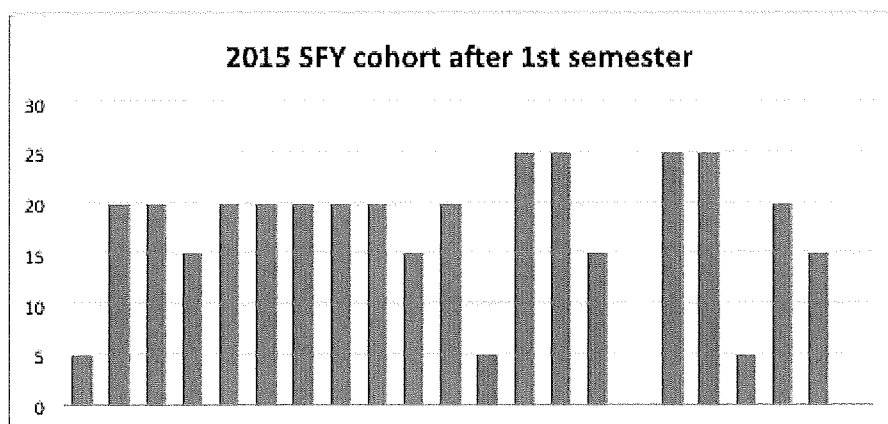


Figure 3, Credits earned after the first semester, SFY cohort 2015, data Feb 2017.

The SFY 2015/16 cohort, now halfway their first year at FSE, features a homogeneous "core" of individuals performing in line with their international and local fellow students, who have been granted direct admissions (22 is the average number of credit earned until February by the regular FSE population, as students generally earn more credits in the second semester than in the first one). The brilliant ones in Figure 2 are mostly of Korean nationality and even display average grades above 8.5. One student has not passed a single exam and three have passed just one.

## 5. Conclusive remarks

The findings of the past two years allow us to draw the following simple conclusions:

- Study Group's recruitment strategies deeply affect students' quality.
- The first SFY cohort showed very poor results, and these were not due to the contents of the SFY programme.
- The second SFY cohort shows a relevant improvement in quality wrt the first one.

A recent evaluation of the programme with the Holland ISC staff has led us to the following measures/targets:

- Drop out during first BSc year should not exceed 33%
- Recruitment and admission to the SFY should have a higher degree of selectivity (for example, targeting students funded via scholarship schemes allows a degree of pre-selection)
- The workload in the SFY should be made more comparable to that in the BSc 1<sup>st</sup> year (ISC Groningen has introduced 21 contact hours with weekly testing)
- ISC has suggested involving FSE academic advisors in the support of SFY students (as experimented at VU), however this has not been introduced yet in an organic way (there seems to be little room for it within the current support staff ftes). There have been just occasional visits by individual students to a couple of FSE academic advisors.

The general impression is that, due to the variability of Study Group recruitment and admission strategies, and to the corresponding unstable student quality, this project requires a high degree of "maintenance", resulting in a considerable time investment of different stakeholders at the faculty. Considering the effective yield of the SFY in terms of international student intake shown so far, one should wonder if this time investment is worthwhile. The performance of the next cohort in the FSE first year is crucial to answering this question.

**Annex 1, nationalities per SFY cohort**

Nationality	14/15	15/16	16/17
Azerbaijan	4	0	1
Saudi Arabia	2	0	1
Egypt	2	0	2
South Korea	2	10	6
Nigeria	1	1	0
Taiwan	1	1	0
Venezuela	1	0	1
Pakistan	1	0	2
Mexico	2	0	0
China	1	11	8
Emirates	1	0	0
South Africa	0	1	0
Morocco	0	1	1
Ukraine	0	4	3
Sri Lanka	0	1	0
Indonesia	0	2	1
Russia	2	2	0
Vietnam	0	1	0
Myanmar	0	1	0
Kazakhstan	0	0	2
Thailand	0	0	2
Ecuador	0	0	2
Belarus	0	0	1
India	0	0	1
Colombia	0	0	1
European	1	2	4

**Annex 2, credits earned during the first year per SFY cohort**

<b>student</b>	<b>2014 after first year</b>	<b>2015 cohort in February 2017</b>
1	10	5
2	20	20
3	30	20
4	40	15
5	20	20
6	60	20
7	25	20
8	52	20
9		20
10		15
11		20
12		5
13		25
14		25
15		15
16		0
17		25
18		25
19		5
20		20
21		15
22		0
23		
24		
25		
26		
27		
28		
29		
30		
31		
32		
33		
34		
35		
36		
<b>Cohort total</b>	<b>8</b>	<b>22</b>
<b>ECTS per student</b>	<b>32,1</b>	<b>16,1</b>
<b>ECTS total</b>	<b>257</b>	<b>355</b>



# Experiences UG with the International Foundation Year by Study Group Netherlands

February 2016

In 2013 FEB and FS&E started a cooperation with Study Group, an international organization offering pre-university bridging programmes to talented students worldwide that had started a centre in the Netherlands (Amsterdam): Holland International Study Centre (Holland ISC). For FEB and FE&S such a programme is interesting in order to attract talented international students from countries in which the overall level of secondary education is slightly below what we feel is required to be successful in our UG Bachelor's degree programmes. This would not only help us raise the quantity of qualified international students in our programmes, but would also give us the opportunity to culturally diversify our inflow. Study Group has a huge, worldwide marketing presence, also in countries where we are not actively recruiting or our recruitment efforts have not been successful.

Holland ISC is currently offering IFY programmes for University of Groningen, Tilburg University, VU Amsterdam, University of Twente, The Hague University of Applied Science, Hanze University of Applied Science, and Wittenborg University of Applied Sciences.

The curriculum of Holland ISC's *International Foundation Year* (IFY) for FEB was designed in consultation with the relevant FEB Bachelor programme directors. Since experience has shown that for the FEB BSc's the level of proficiency in mathematics is a good predictor of study success, much of the discussions about the curriculum focussed on the level and amount of mathematics. Ultimately, we decided to aim for the level "somewhat above Dutch pre-university education", or "VWO+", with extra maths requirements for the IFY students preparing for the FEB BSc Econometrics and Operational Research. The first IFY Business was offered in 2013/2014. The table below gives an overview of the results since then.

Study Group International Foundation Year			University of Groningen, FEB BSc IB, E&BE or EOR				
Cohort	Inflow	Completed programme <sup>1</sup>	Cohort	Inflow <sup>2</sup>	≥ 20 EC after 1 <sup>st</sup> semester	≥ 45 EC after 1 year	Continued to year BSc 2
1 (2013/2014)	9	5	1 (2014/2015)	4 <sup>3</sup>	3	3	3
2 (2014/2015)	30	25	2 (2015/2016)	23	7	7	9 <sup>4</sup>
3 (2015/2016)	71	NA	3 (2016/2017)	39	19	NA	NA
4 (2016/2017)	63	NA	4 (2017/2018)	NA	NA	NA	NA

1. Candidates that successfully completed the IFY and were scheduled to enter a FEB Bachelor's degree programme.
2. Candidates that successfully completed the IFY and actually entered the FEB Bachelor's degree programme.
3. 4 entered a FEB BSc and 1 entered the BA English Language & Culture.
4. 4 students got a BSA exemption or changed to a different FEB BSc programme; 1 student met the BSA requirement but did not reregister.

## IFY drop-out rate

Of the first cohort of the IFY Business, only around 50% of the IFY students successfully completed the programme. The other 50% failed to complete the programme or decided to transfer to another institution in the Netherlands or abroad.

Several reasons for this relatively high failure rate were identified. First of all, it turned out that for the firsts cohort of the IFY programme, the entry requirements used were not yet optimally aligned with the level and content of the curriculum. Also, since marketing and recruitment started quite late, there was no time to optimally prepare the recruitment channels. Finally, there were some issues with one of the IFY teachers, who unexpectedly revealed the lack of crucial didactic skills. For cohort 2 the drop-out rate was in line with what Study Group was aiming for<sup>1</sup>.

<sup>1</sup> Study Group generally aims for a maximum drop-out rate of 20%.

However, the high drop-out rate of cohort 3 indicate that there are still some issues to solve for Holland ISC<sup>2</sup>.

### **Progression to the FEB Bachelor's degree programmes**

For several reasons, not all of the students that successfully complete the FEB IFY actually enter the FEB Bachelor's degree programme. For instance, we see that some of our Dutch and international colleagues are quite happy to accept our IFY students into their Bachelor's degree programmes. We have no formal means to prevent this, ultimately the choice is with the student. Also, one of the IFY Business candidates entered the UG BA English Language & Culture, so there is even some internal competition.

### **Student performance in the FEB Bachelor's degree programmes**

#### *1<sup>st</sup> cohort*

In September 2014 the first IFY cohort entered a FEB Bachelor programme. The cohort consisted of 4 students. During their first BSc year, 2 of the students completed the full 60 EC while 1 managed to complete 45 EC. The 4<sup>th</sup> student only completed 25 EC and failed to meet the BSA requirement.

#### *2<sup>nd</sup> cohort*

IFY cohort 2 started their FEB Bachelor's degree programme in September 2015: 23 students. After the 1<sup>st</sup> semester we observed that this cohort was not performing as well as we had expected from candidates that passed the IFY. Many of them failed courses with very low grades, and in quite a few cases the scores for the retake were similar to or even lower than the scores for the regular exam. Over the 2<sup>nd</sup> semester this situation did not improve and in the end only 7 of the 23 students managed to meet the BSA requirement (45 EC). 9 students progressed to year 2 of the BSc (3 students who did not meet the BSA requirement got a BSA exemption or changed to a different FEB BSc programme; 1 student who did meet the BSA requirement did not reregister).

Of cohort 2, after 1 year:

- 4 students completed 60 EC
- 2 students completed 55 EC
- 1 student completed 45 EC
- 3 students completed 35 EC
- 2 students completed 25 EC
- 1 student completed 20 EC
- 4 students completed 10 EC
- 6 students completed 5 EC
- 1 student completed 0 EC

For FEB, this was not a satisfactory result. The main reason for us to team up with Study Group is that we expect the IFY to provide us with an inflow of students that are well prepared to be successful in our BSc programme. Also for Study Group this result was of course a serious problem. Their business model is based on offering students an effective pathway into university. With a success rate of 30% in the first year of the Bachelor, they will hardly be able to convince their market that the IFY preparation actually is effective. For both parties involved, already after the 1<sup>st</sup> semester it was clear that this was a very serious issue that needed immediate attention.

### **Student feedback**

First feedback from the IFY students at FEB (after the 1<sup>st</sup> semester) suggested that the problem may not be the IFY course content as such, but rather the way this content was delivered. Students mentioned problems with the change from the relatively small-scale IFY setting, with intensive support (maybe even a certain degree of "pampering") and guidance for individual students, to the much more massive FEB setting, in which students are to a larger extent required to find their own way. Related to this, they seemed to have difficulties getting used to the more individual, independent way of studying, in which they themselves were responsible for the efficient planning of

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<sup>2</sup> Part of the cohort drop-out rate is the result of some of the measures introduced to improve the performance of the IFY students at FEB, e.g. limiting the number of retakes in the IFY (see page 3).

their study activities, and with the efficient processing large amounts of literature. Given the high workload in the FEB Bachelor, this led to study problems. Some of them also commented they had problems adapting to multiple choice examinations, something they had not practised much in the IFY.

Holland ISC had further talks with some of the cohort 2 students, to try and find out what might have led to the poor performance of some of them. Quite a few of the students that were not performing well at FEB were also among the weaker students in the IFY. Holland ISC was particularly interested in hearing the story of the students that did very well in the IFY but did poorly at FEB. Their story was in line with what we had already heard from students.

Based on all the feedback, in March 2016 a start was made with the improvement of the IFY. Some measures could already be (partly) implemented for the benefit of cohort 3 (at that moment studying in the IFY), but other measures would only benefit cohort 4 (who started in the IFY in October 2016).

### **Improvement measures**

To improve the preparation of IFY students for successful study in a FEB Bachelor programme, the following measures have been or will be implemented (proposed by Study Group, discussed with FEB):

#### *Already implemented for cohort 3:*

- With regard to English language proficiency, Holland ISC had already raised the IFY entry requirements by introducing specific requirements for sub scores. As a result, they experienced cohort 3 being academically stronger than cohort 2.
- Part of the IFY curriculum consisted of so-called Edexcel modules. Edexcel is a British higher education certificate that can be awarded to students when they complete a number of pre-defined modules. Initially, Study Group decided it would be important to be able to award the Holland ISC IFY students some kind of officially accredited certificate and they therefore chose to integrate the Edexcel requirements into the curriculum.<sup>3</sup> However, the Edexcel modules have turned out to have a more “vocational” style of teaching and examining that does not really add to the preparation of the students for study at a Dutch research university. Study Group has re-evaluated the importance of the certificate and for IFY cohort 3 the Edexcel modules have been dropped from the curriculum, to be replaced by modules with a teaching style and examination method similar to what the students will encounter at a Dutch research university.
- As of IFY cohort 3, the number of resits students are allowed to take has been limited. This will mean that the weaker students will not be allowed to progress to UG. As a result, Holland ISC expected that of cohort 3, only 60% of the students will make it through the Foundation Year.
- The Study Tools module in term 3 of the IFY curriculum has been adapted to focus more on getting students used to efficiently processing large amounts of text, and on time management skills that can help them prepare for exams.
- We changed the setup of the annual visit of the IFY students to FEB. From 2016 we ask a FEB lecturer to give a presentation about the setup of his/her Bachelor’s degree course, teaching modes, workload, examination, etc. Also, we ask an IFY studying at FEB to present his/her experiences. With this we hope we can give the IFY students a better idea of what they can expect (and we expect from them) when studying at FEB .

#### *To be implemented for cohort 3:*

- Holland ISC proposed to set up an Academic Board with input from UG academics, to decide on a continuous improvement process for the IFY curriculum, assessment methods, entry/progression requirements, teaching style, etc. Also, FEB is asked to share the course manuals of the (relevant) 1<sup>st</sup> year BSc courses with Holland ISC and provide them with examples of examinations.
- Holland ISC will start a University of Applied Sciences (UAS) track within the IFY, with a January start. This will allow for weaker students in the UG track (which starts in October) to transfer to the UAS track after the first IFY term.

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<sup>3</sup> For the FEB programme directors involved in the discussions about the IFY curriculum, this was not seen as a huge problem, as long as the topics they deemed crucial for the preparation for the BSc (mainly mathematics) would be covered in the remaining credits.

- Holland ISC plans to reduce the level of support to student in IFY term 3, to get them more used to / prepared for a situation in which they will be required to personally take responsibility for organizing their study activities.
- Holland ISC is considering a pilot in which they provide 1 or 2 hours per week of additional guidance/counselling to IFY students that have progressed to UG. This will help identify potential issues early on and can also help students to adapt without being overwhelmed.

*Suggestions for further improvement:*

- Holland ISC will introduce a structural continuous improvement process based on evaluation and proposed actions to improve curriculum, assessments methods & teaching style
- Holland ISC will consider raising the academic progression requirements for degree programmes in which students still seem to be struggling.

All in all, the FEB Faculty Board felt that with the measures presented above, the IFY could be improved in such a way that future IFY graduates would perform significantly better in FEB BSc programmes. The Faculty Board indicated they would keep monitoring the performance of the IFY students, expected to see already some improvement with cohort 3, and see more improvement with cohort 4. Since the intended level of the (mathematics) preparation of the IFY students is “VWO+” and given that they have a year to get acclimatised both culturally as well as academically, eventually, on average, we expect them to perform at least as well or even better than other (non-EEA) students.

**First results**

*Cohort 3*

As mentioned, some of the improvement measures introduced since cohort 2 could already benefit cohort 3. And indeed, it seems that, based on the 1<sup>st</sup> semester results, cohort 3 is performing better:

Cohort	Students in cohort	Completed after 1st semester (max = 60 EC)						
		0 EC	5 EC	10 EC	15 EC	20 EC	25 EC	30 EC
Cohort 2	23	1	10	3	3	0	2	4
Cohort 3	39	0	9	6	5	6	8	5

Of cohort 2, 74% of the students had completed 15 EC or less after the end of the 1st semester. For cohort 3 this was 51%. This is a clear improvement, which indicates that the improvement measures are having an effect. However, cohort 3 is still performing below the BSc cohort average, while we would expect them to perform on (or even above) average (see above). We therefore expect another significant improvement with the results of cohort 4.

**Other issues**

*UG - Study Group agreement*

Initially, in 2013 an agreement was signed by Study Group and FEB for the IFY Business. When FS&E became involved, in 2014 we decided it would make more sense to make a more general UG-level agreement, with an annex specifying the RUG faculties involved. This agreement was discussed between UG’s Office of the University and Study Group and was finally signed in November 2016.

*Holland ISC Groningen*

The inflow in the UG IFY has grown rapidly and is predicted to keep growing. The UG IFY was initially offered at Holland ISC’s centre in Amsterdam. One of the downsides of this was that some of the UG IFY students changed their mind during the IFY and decided to stay in or near Amsterdam, moving to a Bachelor at another Dutch university. We therefore welcomed Study Group’s plan to open up a second Holland ISC in Groningen. For them, this was efficient since UG was one of their most important clients, and they were in the process of also developing a co-operation with Hanze University of Applied Science. In addition to that, University of Twente had indicated that they would prefer their IFY candidates to be located in Groningen rather than in Amsterdam. For UG having the IFY students in Groningen would also have significant benefits. We expected they would be less

inclined to opt for another university after having spent the year in Groningen. The geographic proximity would make it much easier for Holland ISC and UG to facilitate the successful transfer from IFY to Bachelor. For instance by introducing the IFY students to the UG way of teaching, and by having UG faculties contribute to the teaching in the IFY (for example by involving students from the UG Teacher Training programmes). Also, it would make it much easier for us to organize a “soft landing” in our BSc by organizing more introduction activities during the IFY year.

The UG Board of the University were happy to see Holland ISC come to Groningen and VGI facilitating the search for a suitable location. Holland ISC decided to move to Groningen in two steps. In 2016, they moved into the location Zernikepark 4, where in October they started offering the UG IFY Science track. The aim is to relocate the UG IFY Business track to Groningen in 2017. For the housing of the students, Study Group have made a deal with the Student Hotel.

### *Diversity*

One of most important reason for FEB to team up with Study Group is that they have an effective marketing presence in countries where we are not actively recruiting or our recruitment efforts have not been successful. This would allow us to diversify our inflow of international students. However, since also for Study Group the China is an important market and they wanted to build up volume for the new Dutch branch quickly, in practice it turned out that the Chinese were overrepresented in the IFY programme student population. FEB has indicated to Study Group that this was not acceptable, since a significant percentage of our international degree students already is Chinese<sup>4</sup>. For FEB, Chinese students are not a target market for the IFY programme. Also, we were made aware that it was UG policy not to recruit in China through agents, while part of the Chinese Study Group IFY inflow did come through Study Group agents. For various reasons simply excluding Chinese students from entry into the IFY was not a viable option for Study Group. They were however willing to discuss the option of putting a cap on the number of Chinese students. FEB and FS&E agreed with Holland ISC that no more than 20% of the IFY inflow in the FEB or FS&E Bachelor’s degree programmes should be Chinese students. Since cohort 3 was already studying the IFY programme, we agreed that this cap would start with cohort 4 (going to enter an UG Bachelor’s degree programme in September 2017)<sup>5</sup>.

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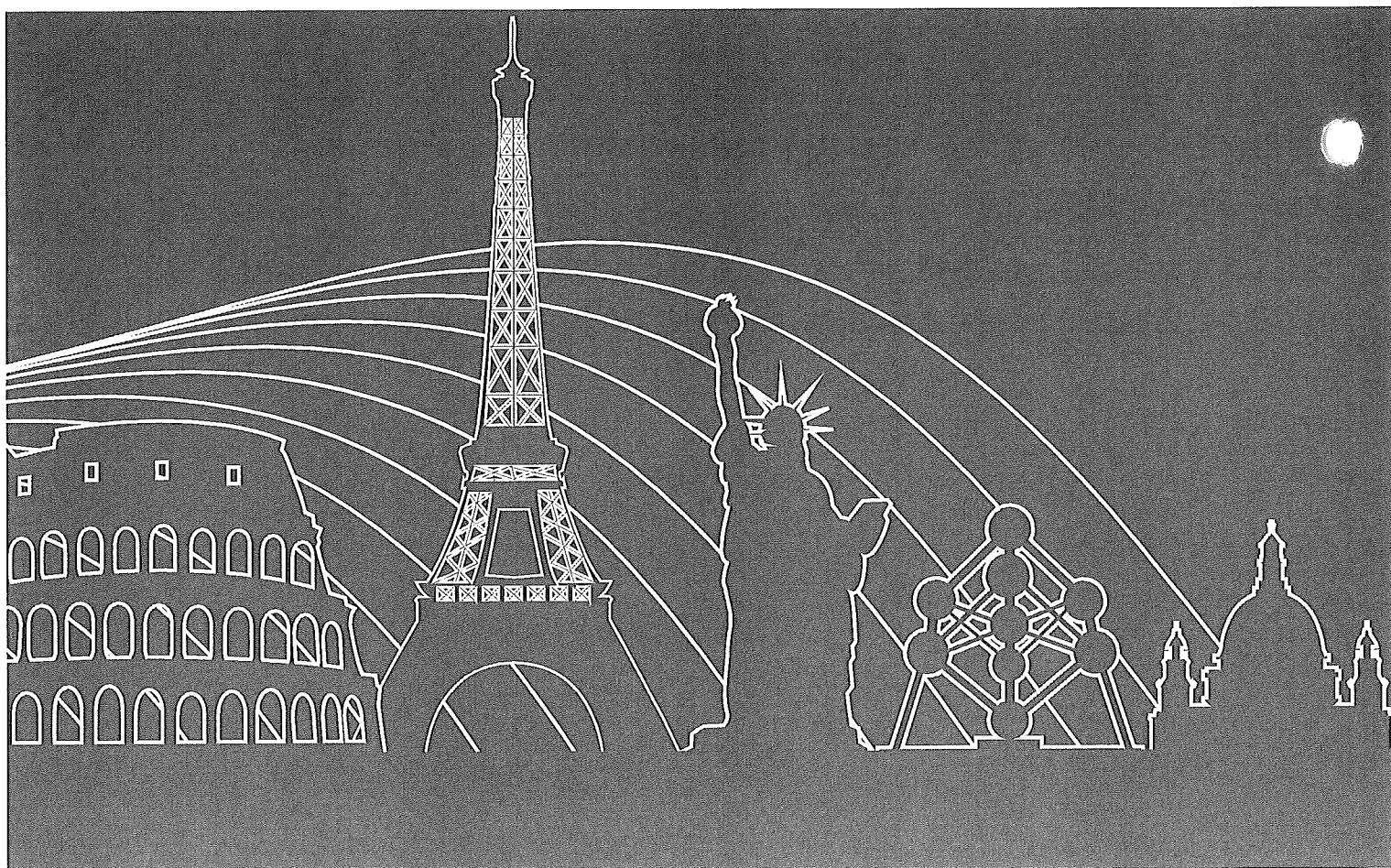
<sup>4</sup> In October 2016, of the registered FEB degree students 17% was Chinese. We would like to keep this below 20%.

<sup>5</sup> The “Chinese through agents” issue was discussed by Study Group and UG but was not specifically addressed in the Study Group - UG agreement. FEB and FS&E made the 20% cap agreement directly with Holland ISC.

# Routes to higher education: the global shape of pathway programmes

A global mapping of an expanding market

September 2016



# Summary

*Routes to higher education: the global shape of pathway programmes*, is a follow-up to the 2015 report from StudyPortals and Cambridge English: *New routes to higher education: the global rise of foundation programmes*, which examined the global growth of programmes preparing students for undergraduate studies.

This updated report now also includes programmes for students seeking postgraduate degrees (such as master's degrees) and has added further data from more than 1,200 pathway programmes around the world, including recently launched programmes, **bringing the total number of programmes analysed to 2,275**. The findings are drawn from StudyPortals' *PreparationCoursesPortal* database, desk research and interviews with industry experts.

## What is a pathway programme?

Pathway programmes enable students who do not have sufficient prior academic knowledge, or the necessary study or language skills, to undergo preparation and training that will allow them to enter undergraduate or postgraduate studies. There may also be an element of cultural adaptation.

Different parts of the world and different institutions use various names to describe pathway programmes, such as foundation programme, international year one or preparation course (pre-bachelor or pre-master).

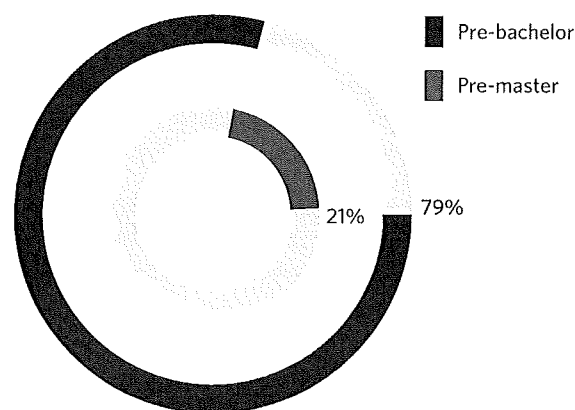
While some pathway programmes are now delivered online or through blended learning, the vast majority (90%) are still taught face to face. Course duration can be as little as four months or as long as two years, but on average pre-bachelor programmes average 12 months in duration, and pre-master programmes tend to be shorter, averaging nine months.

## How do the programmes benefit institutions?

Universities benefit from having greater certainty over a student's ability to complete the course before admitting them. They can also benefit from having a more diverse student body and from the revenue provided by international students.

## How many programmes are there worldwide?

This study has analysed a sample of 2,275 programmes, 21% of which are pre-master and 79% pre-bachelor. It is estimated that this sample represents 80% of the global market.



The majority of programmes are situated in the USA, the UK and Australia. While the programmes host a diverse body of international students, Asian countries – which account for over half of all international students – are similarly well represented on pathway programmes.

### **What are the English and academic entry requirements?**

Candidates must show proof of English language ability and academic achievement.

Various tests are used to assess English ability and the required level of English also varies according to the level of the particular programme. Programme providers must select candidates carefully to ensure any gap between the students' present language level and the level needed to enter their degree course can be adequately bridged by language training during the pathway programme.

### **How much do programmes cost?**

Costs depend on the region where the programme takes place, with North America charging the most and Asian programmes being the most affordable. However, most pre-master and pre-bachelor courses reflect average university tuition fees for their countries.

### **What subjects do students study?**

Business and Management, Social Science, Engineering and Technology and Humanities account for 65% of pre-bachelor courses and 58% of pre-master courses.

On average students are expected to spend 40–50% of their time developing their English skills and the remainder of their time either working on their subject knowledge or study skills.

### **How do students gain access to their chosen institution?**

Pathway programmes often provide a certificate of completion or diploma which allows access to one or more programmes. Some programmes guarantee successful candidates places on specific courses, while others offer only general preparation for undertaking degree-level study.

### **What new models are being explored?**

Some universities are developing direct partnerships with institutions in the countries they recruit students from, or opening their own branches in these countries. Another 'hybrid' model has also been adopted by some institutions which set up separate, wholly owned commercial entities to run their pathway programmes.

### **How will the sector change in the future?**

The market is expected to grow in line with the increase in demand for studying abroad. Growth in each country will depend on the approach of the host country and their policies/regulations regarding international students.

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Pathway programmes enable students who do not have prior academic knowledge, or the necessary study or language skills, to undergo preparation and training that will allow them to enter undergraduate or postgraduate studies.

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# Introduction

**As international student mobility continues to grow in what has become a global educational industry, it is increasingly vital for universities to have strategies for bridging the gaps between different education systems in terms of academic knowledge, language ability and study skills.**

When a cohort of students begin a higher education degree, it is important that their knowledge level is broadly comparable – whether they are domestic or international students. Pathway programmes have been developed to meet this need: ensuring international students start their degree with the same common base of academic knowledge and communication skills that domestic students are expected to have.

In 2014, over 4.5 million students travelled abroad seeking to fulfil their educational aspirations<sup>1</sup>. Demand for courses providing students with the skills to enrol in a full-time degree has grown with the increased mobility of international students.

In 2015, StudyPortals and Cambridge English reported on the increasing number of pathway programmes preparing students to access undergraduate programmes. This second report now includes over 1,200 additional programmes, and has expanded its focus to provide more detail on the USA and pre-master programmes.

This new report provides an overview of the global market for pathway programmes – for accessing both undergraduate and postgraduate studies – and explores key differences between the two across geographic regions.

It answers many of the commonly asked questions about pathway programmes, along with providing insights into emerging trends around the world.

<sup>1</sup> OECD, *Education at a Glance 2014*

# The findings

## What is a pathway programme?

For the purposes of this report, we have defined a pathway programme as an official course (endorsed/provided by a higher education institution) intended to help grant access to that institution's graduate or undergraduate programmes, for international students who:

- have not met one or more of the admissions criteria for an institution, such as the English language requirement
- are otherwise not considered ready to begin their undergraduate or postgraduate degree.

Students on pathway programmes learn and develop skills so as to be ready for regular coursework at the institution, such as English language skills, or skills related to that specific subject or academic culture. The course may also provide the opportunity to adapt to the host country's culture.

This definition has been based on the Institute of International Education's<sup>2</sup> description. The full selection criteria used to define pathway programmes for this report can be found in the Methodology section in the Appendix (p20).

## How are they delivered?

Recently, some providers have begun offering programmes online or through blended learning (figure 1). Most of these flexible courses are for pre-bachelor pathways, but a few are offered for postgraduate pathways.

However, despite the growing popularity of online and blended learning at bachelor and master's level, the vast majority of pathway courses are still delivered traditionally on campus (figure 2), requiring students to attend classes.

The United Kingdom and USA are the exceptions, in that the proportion of e-learning programmes to campus-based courses offered is higher than other countries (figure 1).



### Insights from industry experts

Demand for blended learning, e-learning and short-term programmes is currently increasing, but it is difficult to predict how long this trend will take to mature, particularly in developing countries which may gain most from it.

However, even where universities offer blended learning, students still want some face-to-face teaching. Those newly entering university tend to need more face-to-face interaction. The opportunities for blended and online learning are better suited to 3rd year students who have demonstrated a capacity for independent learning and do not require as much face-to-face teaching.

The increased use of tablets and other mobile devices for learning has meant that even those programmes delivered face to face have some capacity to use blended learning for tasks such as practising language skills.

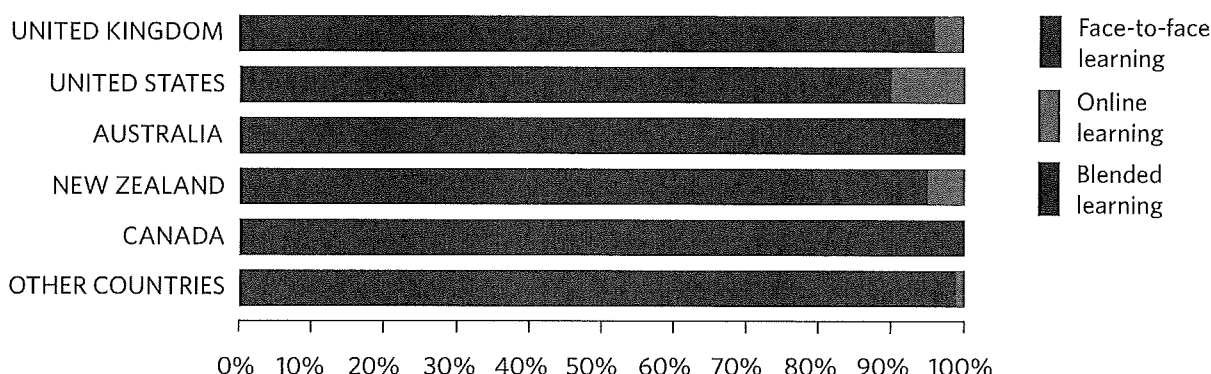


Figure 1: Methods of teaching in the countries with the most pathway programmes

<sup>2</sup> The Institute of International Education Center for Academic Mobility Research and Impact (2015) *Fall 2014 Snapshot Survey of International Student Enrollment*

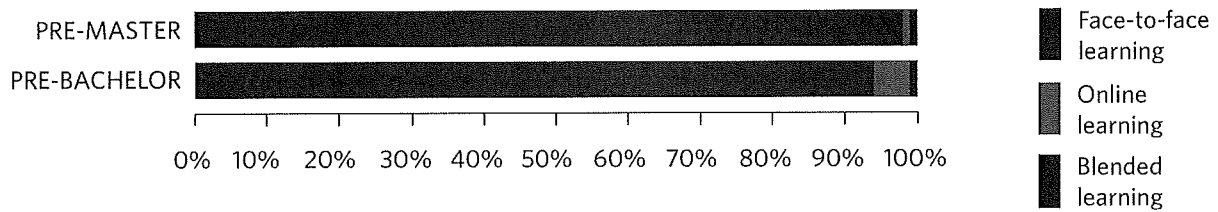


Figure 2: Delivery modes offered for pre-bachelor and pre-master programmes

### How long do the programmes last?

The data (figure 3) indicates broad trends regarding the duration of the programmes:

- Pre-bachelor programmes average 12 months in duration, but some intensive courses can be as short as four or six months, while others can last up to 24 months (in 10% of courses analysed).
- Pre-master courses tend to be shorter in duration, usually lasting 9 or 12 months.

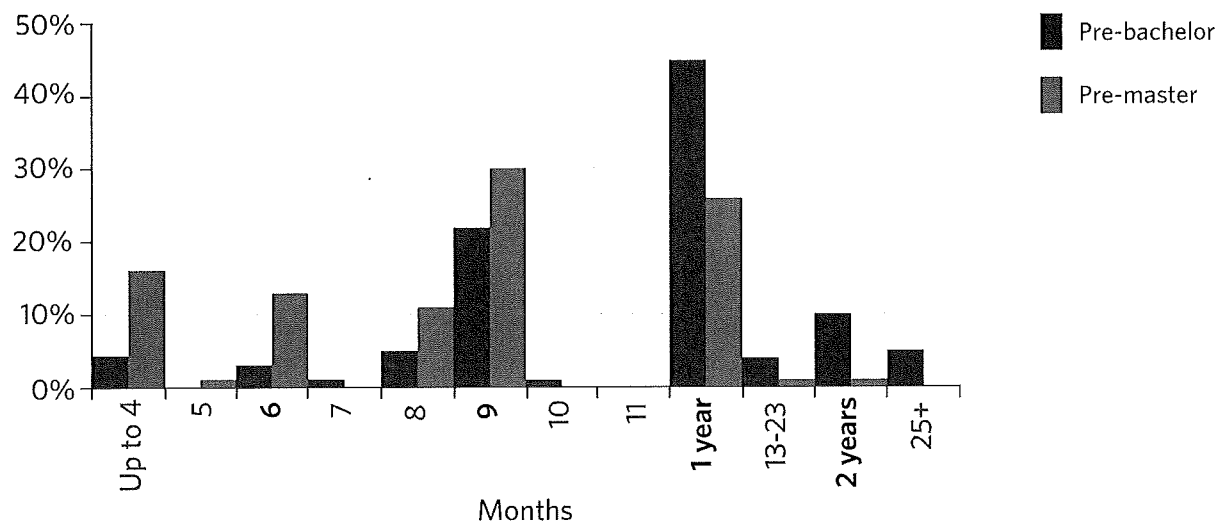


Figure 3: Proportion of courses by duration of course

“  
 Despite the growing popularity of online and blended learning at bachelor and master's level, 90% of pathway courses are still delivered traditionally on campus.  
 ”

## How do programmes balance language learning against academic study?

The balance between academic preparation and English language skills varies greatly from programme to programme. The student's initial level of English when entering the course is an important varying factor.

Evidence from the industry experts we interviewed indicated that around 40–50% of students' time on a pathway course would be spent on improving their English, with the remainder spent on studying their chosen subject and developing 'soft' study skills, such as communication, independent work, team work and leadership. These soft skills are viewed as particularly important within the US.

In most cases, English language assessment is conducted as part of ongoing evaluation performed throughout the teaching of the academic subject.



### Insights from industry experts

Because students now have a higher level of English on arrival at courses than in previous times, they are seeking to come away from pathway programmes with a certificate or another learning experience in addition to gaining English skills.

## What are pathway programmes called worldwide?

Pathway programmes can be found under different names, depending on the country in which they are offered, and the institutions offering them.

Most programmes use one of the following names:

- foundation programme
- pathway programme
- preparation course (pre-bachelor or pre-master).

A thorough review of different names for pathway programmes, including analysis of commonly occurring words in names, appeared in our 2015 report: *New routes to higher education: the global rise of foundation programmes*.

“

Pathway programmes provide universities with students who are well prepared to be successful in their studies and who will go on to graduate.

”

## How do the programmes benefit institutions?



### Insights from industry experts

Pathway programmes provide universities with students who are well prepared to be successful in their studies and who will go on to graduate.

Where pathway programmes are conducted in-house, universities can also access additional revenue from international students via their tuition fees.

Universities also gain benefits from having a diverse cohort of students and extending their reputation in target countries where they recruit students.

Universities gain from pathway programmes in a number of ways:

- Universities benefit from ensuring they have confidence in students' ability to successfully complete their course before admitting them to further study.
- Creating a clear path for international students to enter their institution encourages increased diversity of the student body – most universities have policies encouraging variety in the nationalities and backgrounds represented within the student cohort.
- Universities gain from tuition fees (where pathway programmes are held in-house).
- Insight into the entry level of students taking pathway programmes is useful for institutions when developing or improving their courses.
- Pathway providers can offer universities the benefits of their large sales and marketing network to recruit students the university would otherwise have found it difficult to engage with directly.
- By enrolling students who are talented, but do not yet meet the admission criteria for the full-degree programmes, institutions can widen the pool of students they recruit from.

## How many programmes are there worldwide?

A total of 2,275 programmes were identified and analysed for this report. It is difficult to estimate how many programmes were not included, but taking into account the restrictions made in the selection of data, and the rate of new programmes being developed, it is conservatively estimated that our sample represents approximately 80% of the overall global offering.

In terms of their global distribution (figure 4), the majority (55%) of programmes are offered in Europe. North America and Oceania are in second and third place, respectively (30% and 14%). Asia offers just 1% of the programmes analysed, and they are mostly pre-bachelor.

Splitting the data by pre-bachelor and pre-master programmes shows that North America offers 50% of pre-master courses globally. Europe is second, offering 45% – with most of those located in the UK.

English-speaking countries have topped the list of destinations for international students<sup>3</sup> in recent years, which is no doubt why the majority of pathway programmes are found in these countries.

Even when pre-master programmes are added to the data, the UK, although it receives only 10% of internationally mobile students, still offers almost half of the world's pathway programmes. Conversely, the USA receives the largest share of international students in the world (17%<sup>3</sup>), yet only offers 27.6% of the world's pathway programmes – indicating an opportunity for growth as the market matures and higher education institutions admit more international students.

Despite the varying approaches of the USA, the UK and Australia, a clear trend emerges from the data – the three English-speaking nations that between them host over a third of the world's international students (34%<sup>4</sup>), also have the most pathway programmes to cater for them.

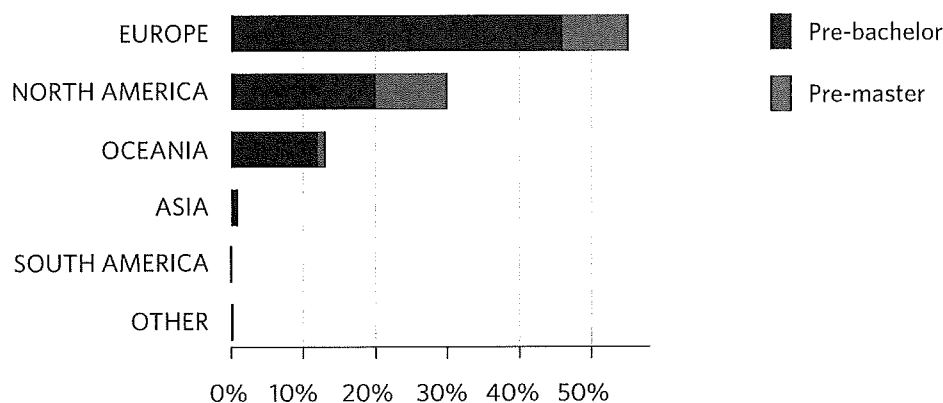


Figure 4: Distribution of pathway programmes by continent

<sup>3</sup> UNESCO (2013) *Global Flow of Tertiary-Level Students*

<sup>4</sup> International Unit (2015) *International Higher Education in Facts and Figures*

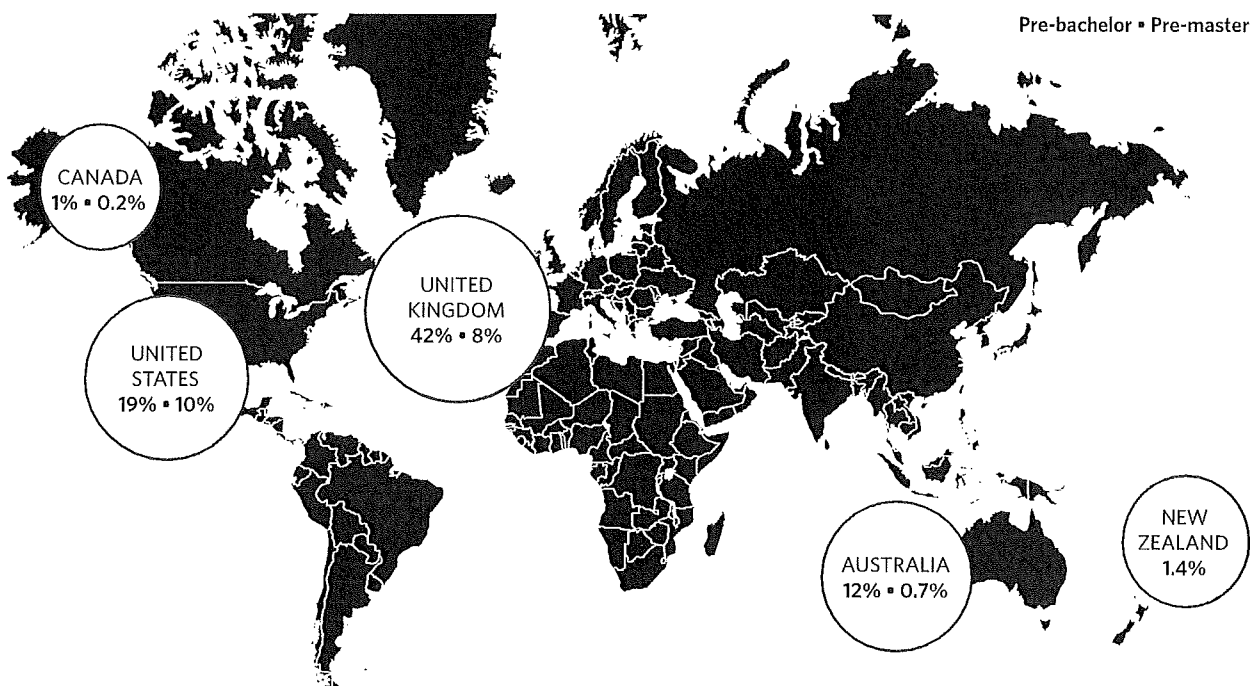


Figure 5: Distribution of pathway programmes by country (only showing countries with >1% of programmes)

**Countries with less than 1% of global programmes (descending order)**

Ireland, Malaysia, United Arab Emirates, Czech Republic, Netherlands, Sri Lanka, Germany, China, Hungary, Poland, Russia, Spain, France, Malta, Austria, Belgium, Colombia, Cyprus, Israel, Italy, Japan, Kazakhstan, Mauritius, Norway, Qatar, South Korea, Switzerland, Finland, Sweden, Lithuania



**Insights from industry experts**

One reason for the strength of the pre-master market in the UK is that it is one of the only countries offering one-year master's programmes, making it even more critical to ensure students have the right skills before the programme starts.

Other factors include UK secondary education being one year longer than in many countries, and UK degrees being shorter, requiring more international students to catch up before entering intensive undergraduate study.



**Insights from industry experts**

The offering of pre-master programmes in Australia is very underdeveloped: even universities with strong master's programmes tend not to offer pre-master programmes. Australia has recently moved to a two-year system for master's degrees, perhaps making pre-master programmes less necessary than in the UK.

**What is the global value of the market?**

We estimate that the global market for English-medium pathway programmes has a value of US\$1.4 billion per year.

This estimate is based on extrapolation of data provided by market experts, and our own desk research.

## Where do students come from?

Research by the OECD and the UNESCO Institute for Statistics indicates that the greatest proportion of the world's international students (53%) continues to originate from Asian countries.

The countries with the largest numbers of students travelling internationally for study are China (22%), India (6%) and Germany (3.9%)<sup>5</sup>.

The trend in many universities is towards policies that encourage a diverse student body within their pathway programmes. However, while these priorities are frequently incorporated into pathway recruitment strategies, universities and pathway providers have recruitment targets to meet, and must inevitably focus on those countries showing the most demand for international study - resulting in Chinese and Indian students frequently being well represented on programmes.

## Who provides the programmes?

While just under a third of universities offer their own pathway programmes as part of their general educational offering, the majority of programmes are outsourced to pathway providers.

The relationship between the institution and the pathway providers varies greatly. Some institutions simply license providers to carry out pathway programmes on their behalf, but with others, the relationship has been described as a 'joint venture', with closer partnership between the two agencies and fuller integration of the pathway into the university degrees.

## Which providers have most market share?

Six providers represent more than half of the market for pathway programmes: Cambridge Education Group, INTO University Partnerships, Kaplan International Colleges, Navitas, Study Group and Shorelight. These programmes are most common in the UK and Australia, but are also growing in the USA.

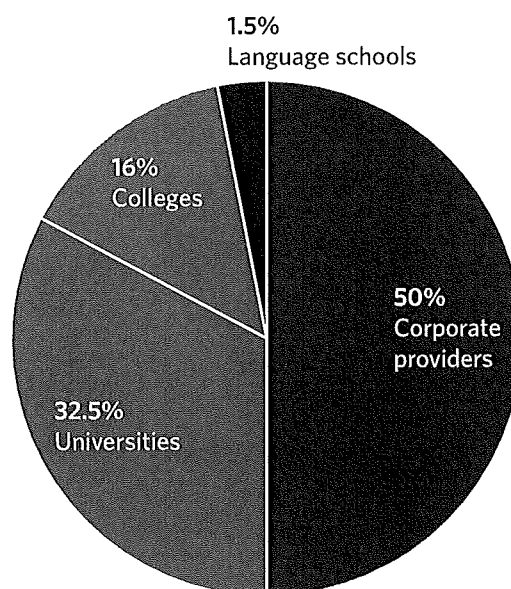


Figure 6: Market share of pathway providers by type\*



### Insights from industry experts

While the experts we talked to agreed that encouraging diversity within the student body was important, they also agreed that China was the major source country in terms of international student recruitment, mentioning that around one in three international students is Chinese.



### Insights from industry experts

Pathway providers are predicted to grow in the USA which, compared with other countries, has been slow to adopt the use of third-party agencies for delivering pathway programmes.

One of the challenges the USA faces, in terms of the growth in use of pathway providers, is forming partnerships with these agencies and ensuring they provide students with the correct level of training.

<sup>5</sup> OECD (2015) *Education at a Glance 2015: OECD Indicators*, OECD Publishing

\* Based on number of programmes listed online



## What are the English and academic entry requirements?

For students, the entry requirements have two main components: language assessment and the evaluation of academic knowledge.

### Academic requirements

Generally, pathway providers need proof of academic credentials to grant access to their programmes. The level of knowledge required varies widely, depending on the courses students ultimately intend to apply for.

Students may be asked to provide this proof in the form of a high-school certificate or bachelor certificate, depending on the degree level they seek. Some students may only be required to demonstrate they have completed a certain number of years in education.

### English language requirements

Pathway providers will use some kind of assessment of English language ability to gain evidence that candidates' English skills are at a level suitable for academic study. They need to be certain that:

- the candidate has sufficient communication skills to complete the pathway programme;
- the gap between the candidate's current language skills and those required for entering their chosen degree course can be bridged within the timescale of the pathway programme.

Candidates failing to demonstrate sufficient English ability may be offered additional intensive language training.

### What kind of English assessment is used?

While established tests such as *IELTS* and *TOEFL* (Internet or paper-based version) remain the most requested English assessments for admission to pathway programmes, other assessments such as *Cambridge English: Advanced (CAE)* and *Cambridge English: First (FCE)* are also in use.

A minority of providers do not use any established English test, either devising their own, or giving candidates academic tasks to assess their English ability.

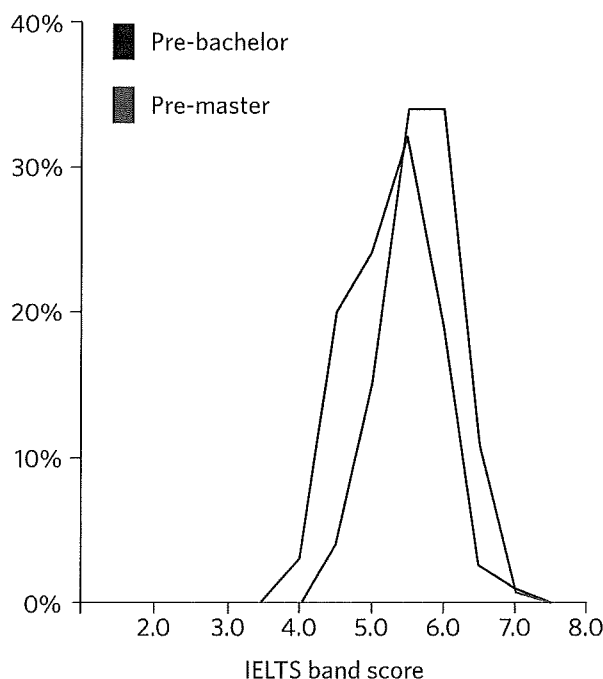


Figure 7: Distribution of English level entry requirements

### Which English levels are required?

Analysis of both *TOEFL iBT* and *IELTS* test requirements (figure 7), shows that the *IELTS* score requirement for pre-bachelor programmes is usually 5.0 or 5.5 (CEFR Level B1–B2), while a broader range of requirements exists for pre-master programmes – between 5.5 and 6.5 (B2–C1). *TOEFL iBT* follows this general trend, with pre-bachelor programmes mostly requiring scores between 45 and 60 points, or between 65 and 75 points for pre-master courses.

Because of the in-depth nature of postgraduate study and the greater demands on written and spoken communication at that level, postgraduate programmes have higher language requirements than undergraduate programmes. More than 97% of the pre-master programmes analysed had higher English requirements than pre-bachelor programmes and this was reflected across almost every region (figure 8).

Programmes in Oceania or North America tended to have the highest language requirements (the most requested *IELTS* scores being 6.5 and 6.0 respectively). This can be compared with Europe, where the UK accounts for the majority of programmes, and 5.5 is the most requested score.



### Insights from industry experts

For many years, *IELTS* was the only approved qualification for Australian student visas and many students still choose *IELTS* as the 'safe' option.

Now that more qualifications are on the approved list and are recognised by institutions, we may see more students applying with qualifications such as *Cambridge English: Advanced (CAE)*.

A similar situation exists in the USA where pathway programmes tend to be TOEFL oriented because it has historically been the general condition for graduate/postgraduate programme entry.

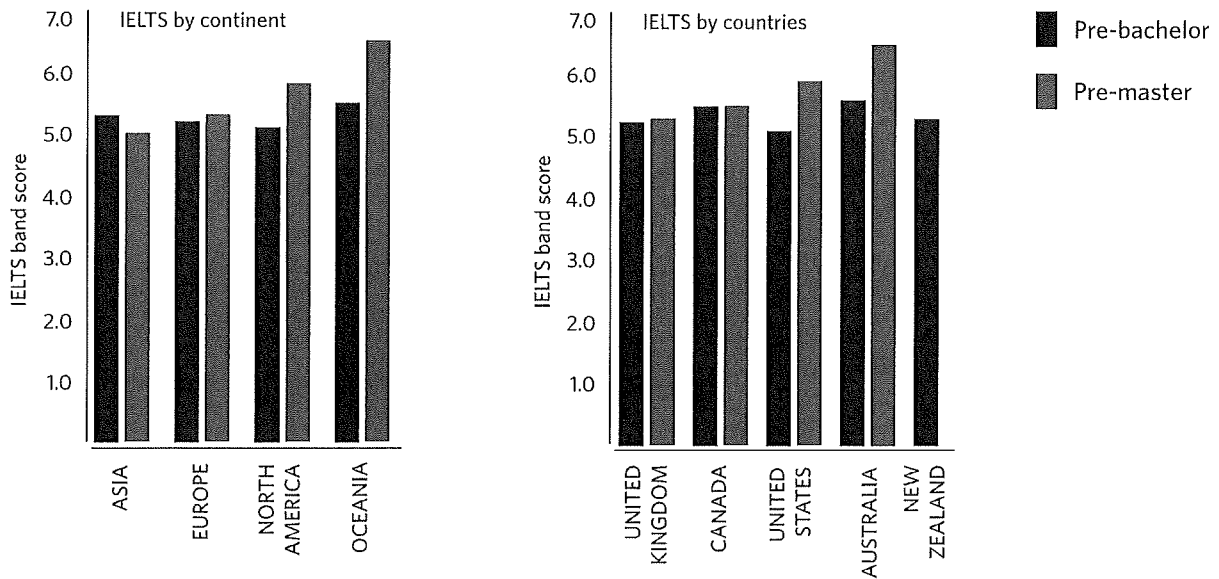


Figure 8: Average IELTS scores required for admission



### Insights from industry experts

The gap between a student's English ability and the language requirements for entry to the university programme is a determining factor in the length of pathway programmes, with most students being expected to increase approximately 0.5 on the *IELTS* band score system each semester.



### Insights from industry experts

On their journey from admission on the pathway course to progression to university, students will probably have their English language tested at least four times, through formal internationally recognised exams as well as in-house tests.

## How much do programmes cost?

Setting appropriate fees is crucial: on the one hand, universities and providers depend on the income from tuition fees to develop their programmes; on the other hand, the relative costs could influence students to choose one institution/provider over another.

While general indications show that fees for pathway programmes are similar to those for a first year in a university programme, costs vary widely from country to country and also across subjects. Programmes leading to degree courses in Life Sciences and Medicine, Natural Sciences, and Engineering tend to be the most expensive, while the lowest fees are found on general programmes.

Our research shows the highest average fees are for programmes based in North America and Australia. Average fees in some European countries are also quite high (e.g. Switzerland), while Asia has the most affordable tuition fees.

Data from the USA and the UK (which accounts for most of the data for Europe), indicates that the fees charged for pre-bachelor and pre-master programmes are broadly similar.

It is also important to note that there are wide variations in tuition fee policies among pathway providers within the same country. Each university has its own policy and sometimes fees differ depending on the country the students come from (e.g. UK universities distinguish between EU and non-EU students).

Also, those pathway programmes which guarantee places at institutions with a prestigious reputation can charge higher fees than those for institutions perceived to be lower ranking. However, our data showed no difference in average fees between pathway programmes offered by private providers and those offered by the universities themselves. There was also no clear price difference between programmes offering guaranteed progression to a university course and those that didn't have this guarantee.

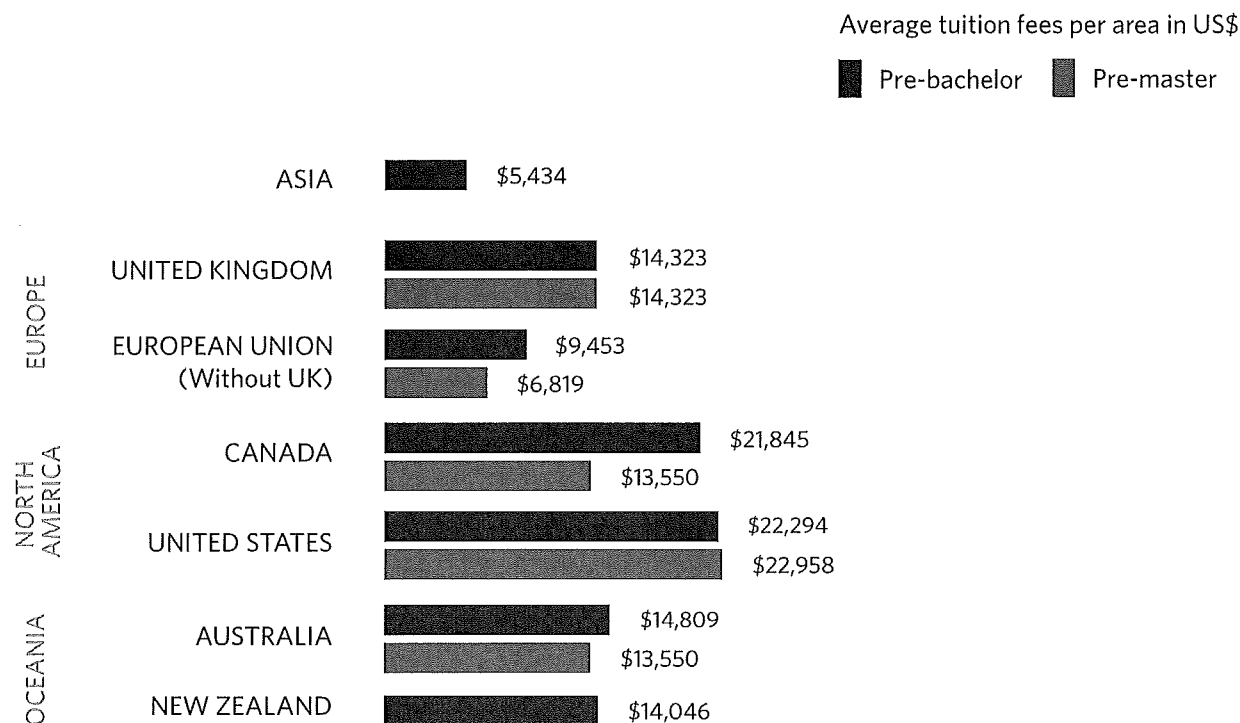


Figure 9: Average tuition fees per country or region\*

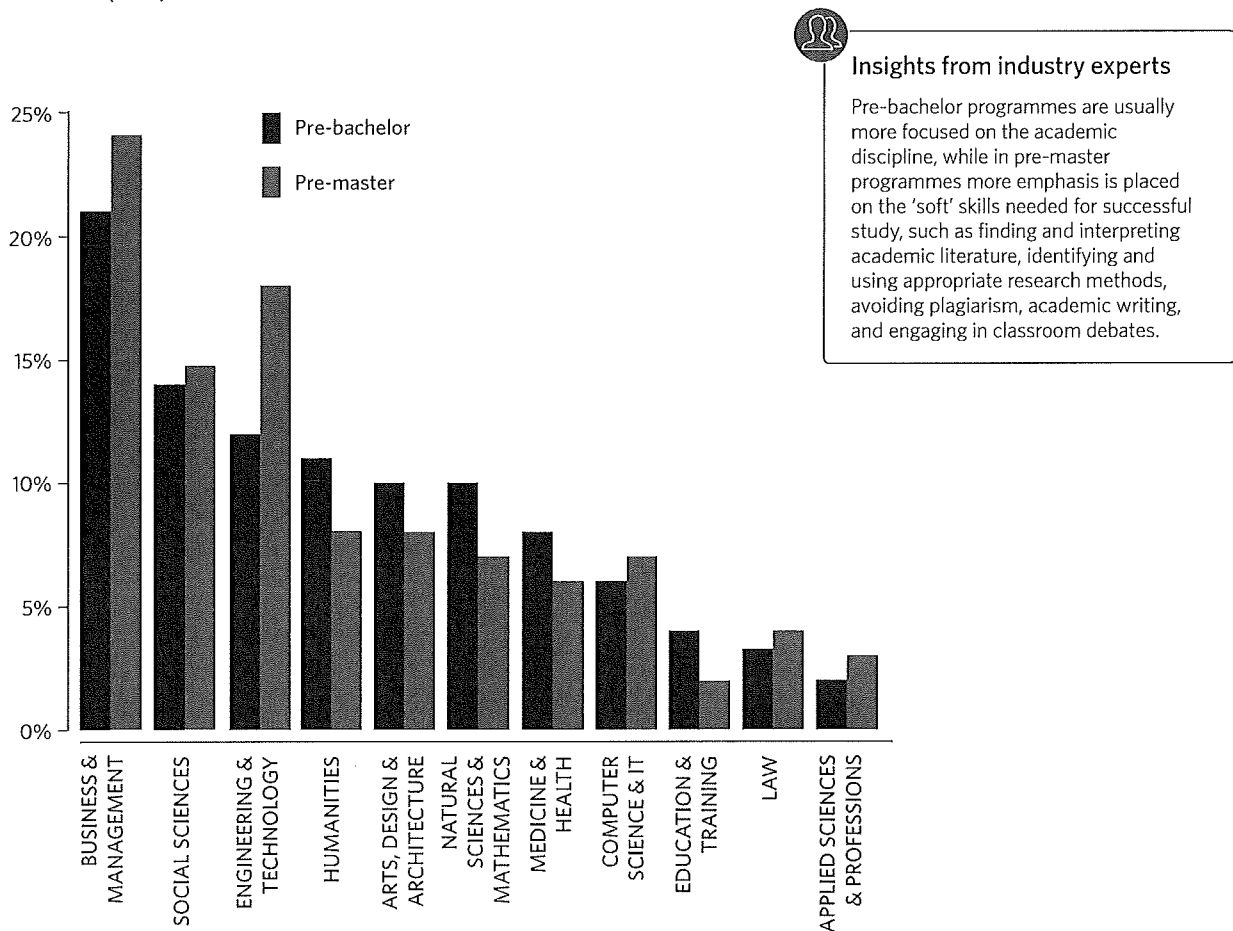
\* Using XE.com exchange rates in June 2016

## What subjects do students study?

Overall, the majority of students accessing pathway programmes are seeking to enter courses in Business and Science (21%), Social Sciences (14%) and Engineering and Technology (13%).

For pre-master programmes, 24% of all prospective students are interested in Business and Management, while 18% choose Engineering and Technology, or Social Sciences (15%).

There is a noticeable difference between the proportion of pre-bachelor and pre-master courses focusing on Engineering & Technology.



### Insights from industry experts

Pre-bachelor programmes are usually more focused on the academic discipline, while in pre-master programmes more emphasis is placed on the 'soft' skills needed for successful study, such as finding and interpreting academic literature, identifying and using appropriate research methods, avoiding plagiarism, academic writing, and engaging in classroom debates.

Figure 10: Distribution of academic disciplines as a percentage of pre-bachelor and pre-master programmes

“

Pre-bachelor programmes are usually more focused on the academic discipline, while in pre-master programmes more emphasis is placed on the 'soft' skills needed for successful study.

”

## How do students gain access to their chosen institution?

### What qualifications do students receive?

Some pathway providers offer a certificate of completion or diploma that can be used to enter courses. However, they have little value beyond gaining acceptance onto the specific course/s for which they are intended. However, there are variations – Victoria University in Australia, for example, offers sub-degree programmes that are qualifications in their own right, and which award credits that can be recognised by other institutions.

### How useful are programmes for gaining admission?

At pre-bachelor level, the majority (56%) of pathway providers offer successful students guaranteed places on specific courses at that institution, or at partner institutions. A relatively small number offer conditional access to a wider range of courses, while 38% offer only general preparation for study at bachelor level.

At the pre-master level, programmes offering only general preparation are in a narrow majority (51%) with 49% of courses leading to guaranteed or conditional places on postgraduate courses.

Programme type	Guaranteed	Conditional	General preparation
Pre-bachelor	56%	6%	38%
Linked to (average)	10 courses	24 courses	10 courses
Pre-master	42%	7%	51%
Linked to (average)	7 courses	5 courses	13 courses

Figure 11: Proportion of pathway programmes by type of entry condition to average number of linked courses

While pathway programmes are usually developed to access a small number of higher education courses, some pathway programmes grant access to a larger range, depending on the provider's partnerships with other institutions and the recognition of that programme.

Of those pathway programmes guaranteeing access to one or more higher education courses, more than 55% offer access to six or more university courses.

On such programmes, students may be expected to nominate the course they want to progress to at the start of the pathway programme, or may instead have a choice of which to apply to at the end of their programme, depending on their performance and achievement.

X-Y Number of linked courses  
% Proportion of all programmes

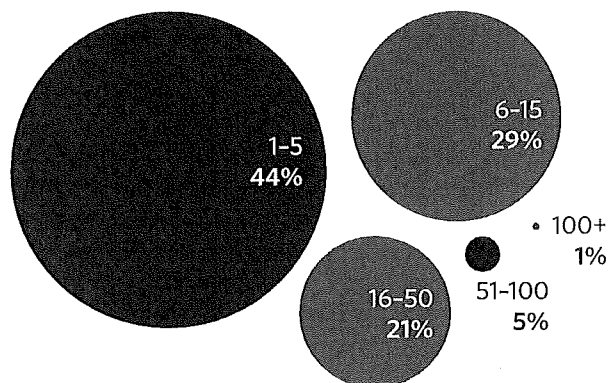


Figure 12: Number of university courses students can choose between after finishing a pathway programme that guarantees entry



#### Insights from industry experts

Some universities integrate their course modules directly into the pathway programmes to ensure students are better prepared and have the right requirements for advancing to their degree.

## What new models are being explored?

Some universities are making innovations within the market for pathway programmes by developing direct partnerships with institutions in the source countries, or opening their own branches in those countries. This enables students to access the same pathway programmes provided at their intended destination, without leaving their own countries. Successful completion then gives them access to the institution's undergraduate programmes.

Another 'hybrid' model has also been adopted by some institutions, whereby instead of outsourcing their pathway programmes to one of the 'big six' providers, they are run by a separate, wholly owned commercial entity set up by the institution.

Other institutions are also offering an 'International Year One' where students get additional support during the first year of their undergraduate programme, to make their transition to international higher education smoother.

# Future of the sector

## How will the sector grow?

In 2015, the OECD<sup>6</sup> predicted the trend for students enrolling in international courses would continue upwards (figure 13)<sup>7</sup>. Altbach and Bassett<sup>8</sup> project 8 million international students by 2025. It is therefore expected that demand for pathway programmes will also continue, growing in line with this increasing demand for international education. In this final section we have taken existing data and qualitative evidence from industry experts to make informed predictions about where growth may come from, and the factors that may encourage or inhibit it.



### Insights from industry experts

Australia is perceived as having led the way with foundation/pathway programmes, with each major institution having some kind of programme in place. Anecdotally, an attendee at an education conference once asked about the future of pathway programmes and received the answer: "Wherever the Australians are, is where the future of pathway programmes will be."

“

Demand for pathway programmes will grow in line with increasing demand for international education.

”

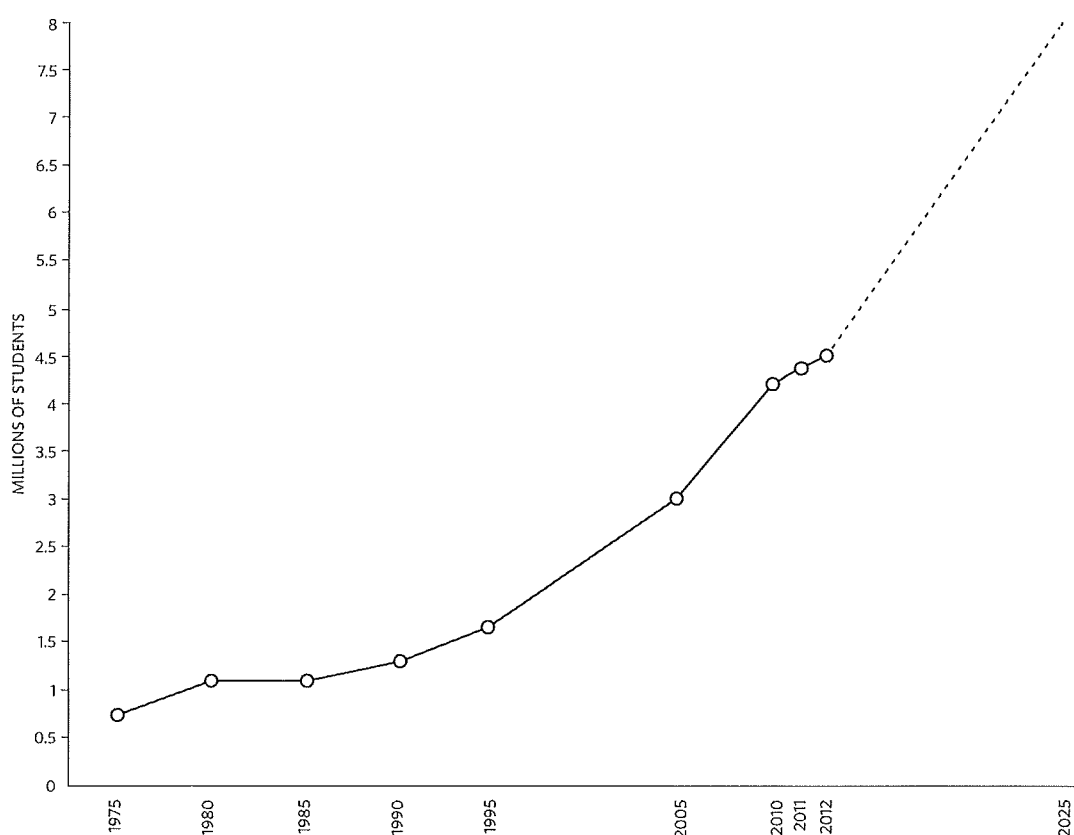


Figure 13: Actual and projected number of students enrolled outside their country of citizenship

<sup>6</sup> OECD (2015) *Education at a Glance 2015: OECD Indicators*, OECD Publishing

<sup>7</sup> For breakdown and analysis of these figures, see our first report: *New routes to higher education: the global rise of foundation programmes*.

<sup>8</sup> Altbach, P. and R. Bassett (2004), "The Brain Trade", *Foreign Policy*, September-October, Washington, DC, pp. 30-31.

## Demand for pre-master programmes

The proportion of international students studying on degree courses varies according to the level of study – with the highest proportion of international students being found at master- or doctoral-level programmes<sup>6</sup>.

The demand for postgraduate study among international students could be a result of the prestige and employment benefits students gain from studying abroad, which may be greater for higher degrees than for undergraduate study. Other possible factors are the shortage of postgraduate places compared with undergraduate places in students' home countries (as is the case in India), and the costs of taking a one- or two-year postgraduate programme abroad compared with a three- or four-year undergraduate programme.

However, the proportion of international students at postgraduate level is not reflected in the numbers of pathway programmes offered – only 21% of pathway programmes are developed for students wanting to enrol on a master's programme.

This disparity might be accounted for by the different education systems around the world being easier to bridge at postgraduate than undergraduate level.

Even so, demand for pathway programmes at higher levels of education could still grow in line with the increasing number of international students.



### Insights from industry experts

Cultural differences between approaches to education can make it more difficult for students from Asian countries to immediately integrate and succeed in their international studies. Therefore, they usually benefit from additional courses on academic research, critical interpretation of academic literature and essay writing.

## English as a medium of instruction (EMI)

A swiftly growing trend has emerged which has seen English shifting from simply being taught as a foreign language (EFL) to being the international medium of instruction for academic subjects<sup>9</sup>. The growth of English as medium of instruction (EMI) has seen an increase in courses taught in English in non-English-speaking countries, particularly Continental Europe. This is expected to further contribute towards the mobility of international students and, consequently, demand for pathway programmes.



### Insights from industry experts

One of the greatest challenges for the growth of EMI is to get and train sufficient teachers to teach in English, and to teach English to such a level that students are ready to follow university courses in English.

## The effects of policy and legislation

As stated in the OECD's *The Shape of Global Higher Education*<sup>10</sup>, the majority of the host countries studied implemented visa policies that welcomed international students, and an easing of immigration policies in recent years was noted.

This has opened the market to international graduates, increasing students' job prospects and enhancing the perceived benefits of pathway programmes. But the focus now needs to be aimed at policies that will make the labour market accessible to international graduates and allow them to find work in their country of study<sup>10</sup>. Countries such as Canada and Australia already allow international students to remain in-country to look for work for a maximum of three and four years (respectively) after their studies. However, while most other OECD countries have similar policies for international students, they are for shorter periods.

“

The demand for postgraduate study among international students could be a result of the prestige and employment benefits students gain from studying abroad.

”

<sup>9</sup> Julie Dearden (2014) *English as a medium of instruction – a growing global phenomenon*

<sup>10</sup> Janet Ilieva, Michael Peak (2015) *The Shape of Global Higher Education: National Policies Framework for International Engagement*.



### Insights from industry experts

There is a high volatility within programmes, especially those sponsored by governments, where policy change and economic or currency fluctuations can all have an impact.



### Insights from industry experts

Even small changes to immigration or visa policy can have unforeseen effects which can be difficult to predict. The UK Visas and Immigration service's recent changes to English language regulations for international students are a case in point.

## Where will students come from?

It is to be expected that the country of origin for students joining pathway programmes will continue to broadly correlate with general trends for international students. This has already been observed within the mobility statistics (see page 9), but demand for pathway programmes will remain driven by the disparities between education systems in students' home countries and their chosen institution, along with cultural differences in their approach to degree-level learning.

Our experts foresee that demand for pathway programmes at both the pre-bachelor and pre-master level will continue to increase from Asian countries, most notably China and India. Both countries are of particular interest for pre-master programme providers because degrees in Science, Technology, Engineering, Mathematics and Business Studies obtained from abroad are particularly valued and well respected.



### Insights from industry experts

Countries where primary and secondary school education lasts 12 years instead of 13 may need a bridge between their output and the intake of the overseas university.

Countries such as China, Korea and Japan have already adopted a strategy for this so students may no longer need to take an academic pathway course in the future.

The Middle East has a 12-year system and is consequently one of the biggest sources of students for foundation studies.

Latin American countries have not had a history of sending students abroad, and it's perceived by some industry experts that this market is ripe for growth, particularly in countries such as Colombia.

Likewise, with the exception of Nigeria, Africa is not currently a major source region for international students, but some industry experts have indicated that they expect this to change within the next five years. Rwanda and Angola, which are experiencing population growth, are cited as being potential future markets.



### Insights from industry experts

Demand for access to university programmes from candidates in South Asia, West Africa and Gulf regions is strong and expected to continue to accelerate. One expert from an Australian institution commented:

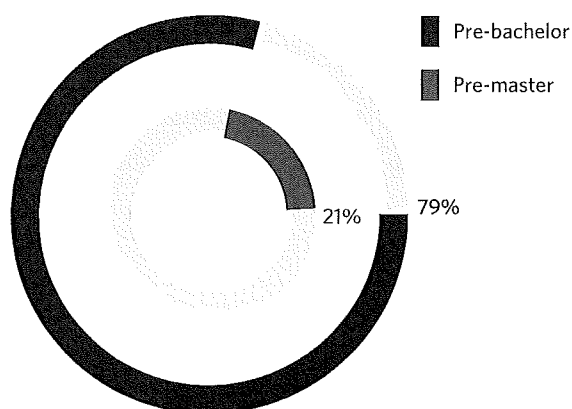
*"At the moment, our largest recruitment countries are China and India, but we also actively recruit students from Asia Pacific, Turkey, Europe, and South America. We also think there is a lot of growth potential in Eastern Europe as a major opportunity, as well as South East Asia (e.g. Burma and Vietnam)."*



# Appendix

## Methodology

Researchers for this report identified and analysed a total of 2,275 programmes, of which 21% were developed for students enrolling for a master or graduate programme, and the remaining 79% offered preparation for bachelor's degrees.



Research for this document included both quantitative and qualitative approaches, and the data, collated from StudyPortals' *PreparationCoursesPortal*, referenced programmes distributed all around the world.

### Data collection techniques

Semi-structured interviews with 10 industry experts	In-depth qualitative understanding of the market. Semi-structured approach to frame the experts' insights to allow benchmarking.
Analysis of data from StudyPortals' Preparation Course database	Information about the number and types of programmes. Most of this data comes directly from programme providers, complemented by StudyPortals' desk research.

### Pathway programme selection criteria

The following criteria were used to identify pathway programmes and exclude programmes out of scope, e.g. high schools providing A-levels, international baccalaureates and generic college diplomas:

Progression to university	The programme is provided by an institution that provides at least one undergraduate or graduate degree programme itself. Or the independent pathway provider has at least one university partnership.
Entry requirements	Entry requirements are lower than for the progression degree.
International	The programme is aimed at international students.
Language	The programme is taught in English and website content is in English.

### Data collection restrictions

The methodology approach used in this research imposed the following restrictions:

- Web pages in languages other than English were not considered.
- Programmes were included only if they have an openly visible presence on the internet or in other freely available publications. Data from sources not openly published was not considered.
- Data was collected within a specific time frame. Programmes may have changed requirements or discontinued since the data was collated.
- The different ways in which institutions name and market their programmes influenced the number of programmes that could be identified.

The constraints imposed by this methodology should be taken into account when drawing conclusions from the findings. Even though the research has been conducted to high standards, neither StudyPortals nor Cambridge English can accept liability for the accuracy of any of the provided insights.

# Acknowledgements

We would like to thank the following people for their support during the development of this paper (in alphabetical order):

- **Jean-Marc Alberola**, Founder and President, *Bridge Education Group*
- **David Amor**, Director, Market Insight and Knowledge, *INTO University Partnerships*
- **Steve Berridge**, Vice-President, International, *Victoria University, Australia*
- **Dr Rodney Gillett**, Group Education Director, *EduCo*
- **Eva Greive**, Head of Studies, Academic English, *University of New South Wales*
- **Dr Shaden Jaradat**, International Officer, Student Recruitment and International Development, *University of Manchester*
- **Larry Jasevicius**, Director of Student Recruitment ONCAMPUS UK & Europe, *Cambridge Education Group*
- **Georgina Jones**, Market Development Director, *NCUK*
- **Paul Sutton**, Academic Director of Foundation Studies, *University of New South Wales*
- **John Wood**, Chief Executive Officer, University Partnerships, Australasia, *Navitas*

# Contributing partners

This report has been compiled by two educational organisations with privileged access to market data, with the intention of contributing to the educational sector's general understanding of pathway courses and pathway provision.

The findings of this report have drawn on the combined expertise of these two organisations and the unique data they have collected on language assessment and higher education.



## StudyPortals

StudyPortals is the international study choice platform with over 2,300 listed institutions in 67 countries. We publish eight portals with the objective of making study choices transparent. Students can access over 120,000 study programmes. We have over 15 million unique visitors to our portals every year.

For more information: [www.studyportals.com](http://www.studyportals.com)

Our mission is to empower the world to choose education: we want to increase accessibility and stimulate people to pursue an education, and furthermore we want to inform and help them to choose the institution, programme and environment that most suits them.

Our ultimate ambition is to make study choices transparent, globally.

Since 2007, our platforms have enabled students to choose the best international university courses, and universities to reach the right international students. Our quality approach has allowed us to gather unique insights into the way students search for study programmes and the kind of information that helps them make decisions.

We started with Master's degrees and have since expanded into Bachelor's degrees, PhDs, short courses and online education. Since 2015, we have also covered the language learning and preparation course sectors.

Students now have access to over 120,000 study programmes worldwide, enabling them to find and compare programmes easily. Higher education institutions benefit from well-informed, proactive, well-matched prospective applicants.

We currently cover almost all of the European on-campus degree market: 96% of ranked universities (both private and public) are listed on our website. Since late 2013, we have been expanding the global coverage of our platform, aiming to have at least the world's top 2,000 universities listed by the end of 2016.



For more information about how StudyPortals can help higher education institutions, go to [www.studyportals.com/institutions](http://www.studyportals.com/institutions)



For more information about pathway programmes, go to [www.preparationcoursesportal.com](http://www.preparationcoursesportal.com)



## Cambridge English

Cambridge English Language Assessment is part of the University of Cambridge. Over 5 million people take Cambridge English exams each year in more than 130 countries. Around the world over 20,000 universities, employers, government ministries and other organisations rely on Cambridge English exams and qualifications as proof of English language ability.

As a not-for-profit organisation, Cambridge English shares much of its research on language assessment with the wider education community through publications such as *Studies in Language Testing* and *Research Notes*, and through reports such as this.



For more information about Cambridge English exams for higher education, go to [www.cambridgeenglish.org/exams/academic-and-professional-english](http://www.cambridgeenglish.org/exams/academic-and-professional-english)



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### English exams for learners of all levels and needs

Our exams cover the wide range of English language learning requirements – from tests for young learners, to exams for people wanting to use English for demanding academic and professional settings.

All our exams are aligned with the Common European Framework of Reference for Languages (CEFR) – the internationally accepted standard for describing language ability.

### Cambridge English exams for entry to higher education

Cambridge English exams can open up a world of study, work or travel opportunities for learners of English. *Cambridge English: First (FCE)*, *Cambridge English: Advanced (CAE)* and *Cambridge English: Proficiency (CPE)* are widely used for admission to higher education.

Together with IDP Australia and the British Council, Cambridge English is also one of the partners that develops and produces the *IELTS* test.

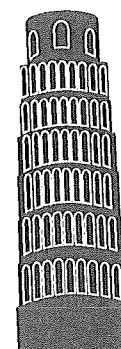
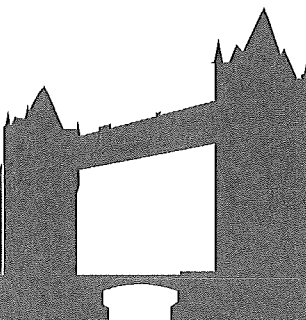
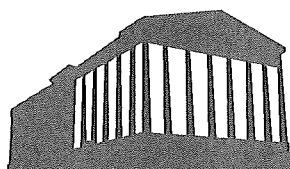
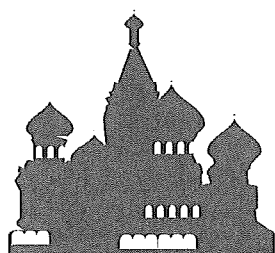
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To help maximise your success, you will be in small class sizes, receive expert guidance in completing your university application, receive one-to-one support for study, welfare and visa matters.

### Benefit from:

*A diverse and vibrant multicultural student community located in the heart of London.*

*Access to the university's world-class facilities.*

*Join the clubs, sports teams and societies offered by the Students' Union.*

### Student success at King's

*The programme really does help people who don't speak English as a first language get a grasp of how UK universities work. It offers a great base for the following year's degree course.*

*Salman, Saudi Arabia. Law pathway, progressed to Law LLB*

### Key details

**Duration:** One academic year full-time, September to June.

**Delivery:** A combination of lectures, seminars, online learning and regular meetings with your personal tutor.

**Content:** Modules covering academic subjects depending on the specialist pathway you choose; academic English and British culture.

**Language entry requirements:** You will need a minimum IELTS 5.5 (with at least 5.5 in Reading and Writing and 5.0 in Listening and Speaking) or acceptable equivalent. Law & International Relations pathway applicants require a minimum of IELTS 6.0 with no skill below 6.0. Students outside the EU are required to complete a UKVI approved IELTS test.

**Academic entry requirements:** You must have graduated from high school outside the UK with a good grade point average (GPA). Some pathways require additional specific subjects and grades. Please see our website for details and GPA requirements for your country.

### Examples of degrees that can be taken

- Biomedical Sciences (including Neuroscience, Anatomy, Pharmacology, Biochemistry, Molecular Genetics, Physiology)
- Medicine
- Business Management
- Geography
- European Politics
- Geography
- International Development
- European Politics
- Law
- Liberal Arts & Politics
- History
- European Politics
- Liberal Arts
- Film Studies
- Philosophy
- Business Management
- Economics & Management
- Chemistry
- Chemistry with Biomedicine
- Business Management
- Economics
- Computer Science
- Electronic Engineering
- Mathematics
- Computer Science
- Mathematics & Physics
- Mathematics & Physics
- Robotics & Intelligent Systems
- Adult Nursing
- Nutrition
- Pharmacy
- Psychology
- Global Health & Social Medicine
- International Management
- International Relations
- Political Economy
- War Studies
- Politics, Philosophy and Law
- International Politics
- International Politics and Economics
- War Studies
- International Development
- Digital Culture
- Computer Science
- Mathematics with Management & Finance
- Pharmacy
- Psychology
- Electronic & Information Engineering
- Electronic Engineering & Management
- Philosophy, Politics & Economics
- Physics
- Physics & Philosophy
- Psychology
- Robotics & Intelligent Systems

### Specialist pathway

- Biology & Chemistry**
- Business Management & Social Science**
- International Relations & Politics**
- Law & International Relations**
- Liberal Arts & Politics**
- Liberal Arts & Social Science**
- Business Management & Mathematics**
- Chemistry & Mathematics**
- Economics & Mathematics**
- Mathematics & Physics**

\* Students must achieve the specified entry requirements to progress onto a King's undergraduate degree.

### Student success at King's

*This course is not just theoretical, it's practical too as we've visited places in London as part of our learning. Actually a year ago, I wasn't comfortable with my English or my skills. Now I feel ready to go to university.*

*Salim, Turkey. Liberal Arts pathway, progressed to English with Film Studies at King's*

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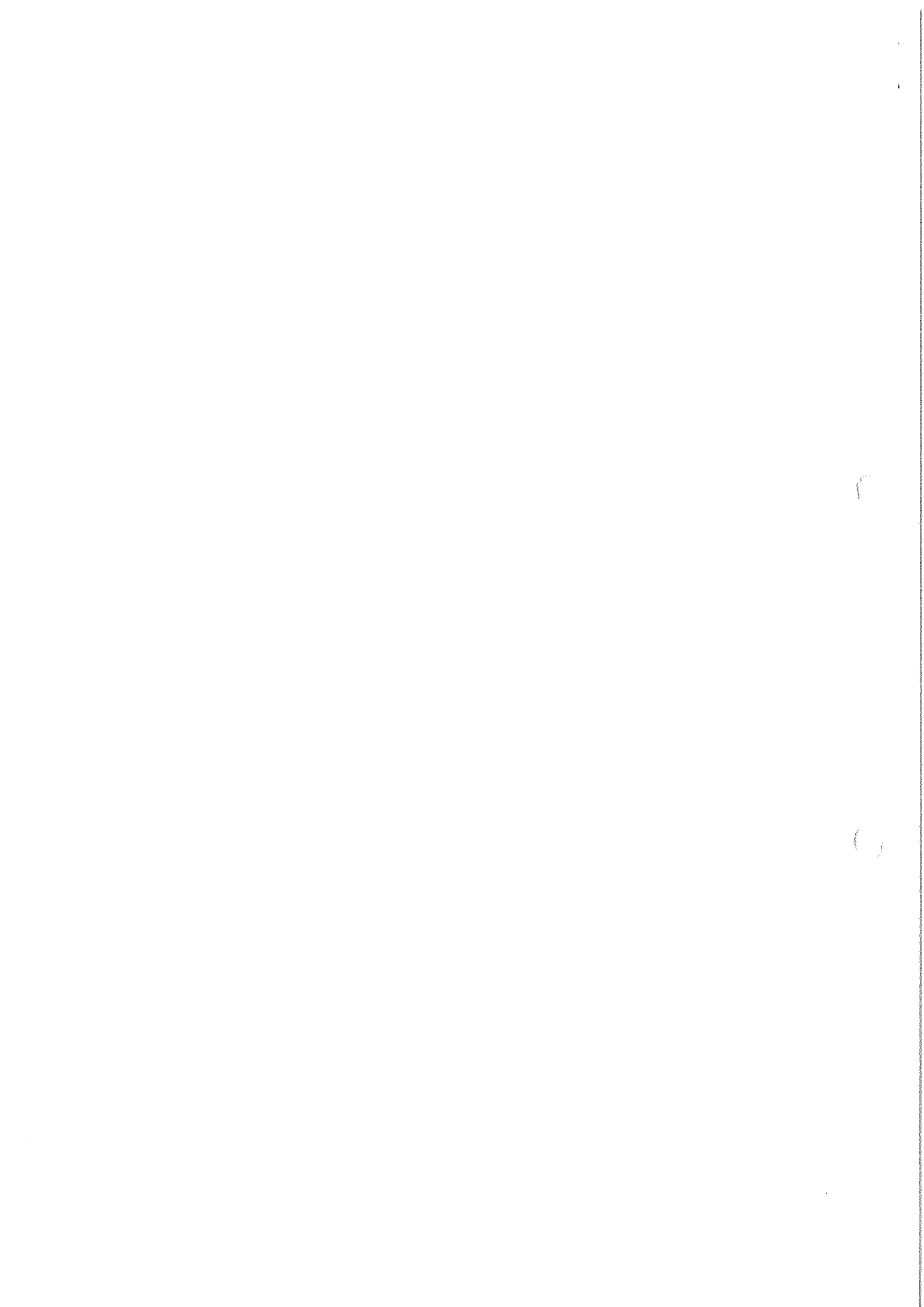
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## briefing note

	Confidential
Meeting	Board of the University
Meeting date	8-May-2017
Subject	Study Group Agreement – next steps
Corsa number	17/04825
Department	ISR
Handling advice	for approval
Summary (maximum of 10 lines)	A memo detailing suggestions for the non-renewal of the agreement between UG and Study Group. ABJZ and COMM agreed with the contents and recommendations in the memo.
Financial implications	NA
If yes, coverage:	
ICT implications	
Suggested decision/Advice	That the Board approve the non-renewal of the agreement with Study Group and confirm Cohorts 1 and 2 (see memo) for entry into UG programs
Follow up	<input type="checkbox"/> Committee of Deans <input type="checkbox"/> Board of the University <input type="checkbox"/> Management Council <input type="checkbox"/> University Council <input type="checkbox"/> Supervisory Board <input type="checkbox"/> Faculty Boards <input type="checkbox"/> Local Consultative Committee <input type="checkbox"/> other:
Communication	<input type="checkbox"/> internal <span style="margin-left: 200px;"><input type="checkbox"/> external</span>

### Next Steps – Study Group

Given the UG has taken the decision to cancel/not renew the current arrangements with Study Group, a decision on current and future Study Group students needs to be made. There are three cohorts to be discussed.

### **Cohort 1: UG Entry in Sept 2017**

Students currently completing Study Group Foundation and due to enter UG in Sept 2017 for academic year 2017/18.

*Recommendation: Allow entry to UG*

### **Cohort 2: UG Entry in Sept 2018**

Students with active applications or offers for Study Group Foundation (commencing Sept '17) and due to enter UG in Sept 2018. The marketing and operational areas of concern to the UG have already taken place over the past eighteen months as Study Group (with the UG's consent) has been actively promoting this pathway option to commence in Sept '17.

Note: Cancelling this cohort's pathway a few months before the commencement of their Foundation program would involve significant risk of poor publicity and damage to the University's reputation in key countries and perhaps also nationally.

*Recommendation: Allow entry to Study Group for 17/18 and the UG in 18/19.*

### **Cohort 3: UG Entry in Sept 2019**

Students considering applying for Study Group Foundation (commencing Sept '18) and due to enter UG in Sept 2019.

*Recommendation: Non-renewal of the agreement and an instruction to Study Group to stop recruitment for their 18/19 UG pathway*

### **General Recommendations:**

- That the UG notify Study Group of the non-renewal of the current agreement. Timing to be determined by ABJZ, COMM & ISR
- That we communicate to all students on a pathway to entry at UG (for the academic years 2017/18 and 2018/19) that their applications and conditions of offer remain valid, as well as include warnings to all pathway students that the final point of entry to UG programs will be September 2018.
- That the UG notify Study Group that all marketing and recruitment for pathway programs leading to academic year 2019/20 and beyond cease immediately.

The decision to cease cooperation with Study Group, and to no longer have a formal pre-university pathway to undergraduate programs, has some implications for the UG's longer-term diversity goals. The current pathway arrangements provided opportunities for students from education systems not of the same quality as the Netherlands a way to reach the entry level required for the University of Groningen. In essence, absence of a formal pathway to UG Bachelor programs means that we will have no direct access to our Bachelor degrees for high-school students from many countries outside the EU.

We do have agreed entry requirements for students from these countries wishing to enter the Study Group foundation and it is possible that some of these can be increased to allow for direct entry to UG programs. However, in some countries, such as Russia and most African and Middle Eastern countries the differing quality of national education systems means that these countries will cease to be direct-recruitment markets for UG bachelor programs. Our focus will need to shift to Masters or to international schools teaching recognized global secondary qualifications.

## briefing note

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Additional work (led by the UG Admissions Office) will need to be done by our global network of representatives, agents, marketing and policy experts to determine where direct entry is possible from

- National secondary education qualifications
- International secondary school qualifications (IB, A-levels, etc)
- Local institutions (eg: Sunway Malaysia)
- Accredited pathway providers (INTO, Navitas, etc)

This work can be completed outside of peak-application periods and will contribute to the strategic knowledge of education systems and qualifications throughout the university but it will take time. Ending the current agreement with Study Group as scheduled on 1 Sept 2018 will allow us the opportunity to build and apply this database in our marketing, recruitment and admissions process.





AN

**Registered**

Study Group - Brighton Study Centre

To the attention of:

Manager Director UK & Europe, [REDACTED]

1 Billinton Way

Brighton BN1 4LF

United Kingdom

E-mail: [REDACTED]@studygroup.com

Cc

Faculty Board FEB and FSE

Holland ISC:

[REDACTED]nd  
[REDACTED]

Piet Heinkade 55, 1019 GM Amsterdam

Date

29. MEI 2017

Our reference

17/05693

Subject

Review on renewal agreement RUG - Study Group

Dear Mr Pitman,

As you are aware, the current agreement between Study Group and the University of Groningen is due to expire on **1<sup>st</sup> September 2018**. With that in mind, the Board of the University recently requested a review of the current agreement.

Having received that review earlier this month, the Executive Board of the University of Groningen, along with the Faculty Boards of Economics and Business (FEB) and Science and Engineering (FSE) have taken the decision not to seek renewal of the current agreement with Study Group.

On the basis of that decision, the Executive Board of the University of Groningen would like to confirm the following;

- Applications and offers to prospective students currently studying at the Holland ISC and on a pathway to enter University of Groningen programs in September 2017 are not affected by the non-renewal of the agreement
- Applications and offers to prospective students due to commence at Holland ISC in September 2017 on a pathway to University of Groningen programs for September 2018 entry are also not affected by the non-renewal of the agreement
- That the September 2018 entry point into University of Groningen programs will be the final entry point for students covered by the current agreement
- That on receipt of this correspondence, Study Group should cease all marketing and promotional activity that relates to all pathways to University of Groningen programs with entry dates beyond the term of the current agreement



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In the case that circumstances arise which are not mentioned in this letter, we wish to express to our intention to resolve these, with you and your team, in good faith.

The University of Groningen contact points for Study Group for the remaining term of the agreement will continue to be; [redacted] Head of International Strategy & Relations, [redacted] [redacted] Head of Marketing and the relevant contacts at our faculties.

The Executive Board wishes to thank Study Group for their continuing efforts to support students in a successful pathway to the University of Groningen.

Yours S [redacted]

λ [redacted]  
Prof. Dr. Sibrand Poppema  
President

Documenten bestuurlijke overleggen FSE en FEB over Study Group.

## **2014**

### Verslag Bestuurlijk overleg voorjaar FEB:

“StudyGroup:

Het is StudyGroup niet toegestaan aankomende studenten die binnen 1 jaar op niveau gebracht moeten worden, te werven in China

RUG maakt afspraak met StudyGroup dat zij geen studenten in China werft.”

## **2017**

### Quicksan FEB BO voorjaar 2017

f. Study Group	FEB is van mening dat de huidige kwaliteit van de instroom via Study Group niet aan de maat is en dat als daar niet op korte termijn verbetering in komt, overwogen moet worden het contract (loopt af in 2018) niet te verlengen.	De overeenkomst met Studygroup eindigt met in gang van 1 september 2017 en zal niet worden verlengd. Over alternatieven wordt nagedacht en de input van FEB daarbij is belangrijk.
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### Quicksan FSE BO voorjaar 2017

“Study group: Wordt mondeling door CvB toegelicht.”

### Verslag FEB BO voorjaar 2017

Study Group:

Poppema zegt dat de overeenkomst met Studygroup eindigt met ingang van 1 september 2017 en niet zal worden verlengd. Over alternatieven wordt nagedacht en de input van FEB daarbij is belangrijk. De afspraak met Studygroup was dat er niet geworven zou worden in China. Dat is toch gebeurd en er zijn daar bovendien kwalitatief slechte studenten geworven. Dat is ook slecht voor het imago van de RUG in China. Een neveneffect is dat de Nederlandse studenten en het onderwijzend personeel de conclusie kunnen trekken dat Chinese studenten die aan de RUG studeren, onder de maat zijn. [REDACTED]

[REDACTED] Het niveau van de door Studygroup aangebrachte studenten in zijn algemeenheid, ook van buiten China, is te laag. De laatste instroom zal bij de RUG in september 2018 plaatsvinden. FEB deelt het standpunt dat de huidige kwaliteit van de instroom via Study Group onvoldoende is en staat achter het niet verlengen van de overeenkomst. FEB wil meedenken over alternatieven waarbij er een grote voorkeur is gebruik te maken van een professionele aanbieder. FEB zal intern nagaan waarom er tot vorig jaar geen Chinese studenten via Studygroup kwamen en daarna ineens wel. Volgens Sterken is stilzitten geen optie: er zou ook nagedacht kunnen worden

over een online programma want studenten willen meer specialisatie en ook meer multidisciplinariteit. Poppema geeft aan dat er bijvoorbeeld ook geworven kan worden voor de RUG en Yantai. Dat gebeurt bijvoorbeeld in Liverpool.

FEB heeft 3 cohorten FY studenten gehad:

2014-2015, cohort 1: 4 studenten; 3 Chinees

2015-2016, cohort 2: 23 studenten; 8 Chinees

2016-2017, cohort 3: 39 studenten; 26 Chinees

Afspraak: FEB wordt betrokken bij mogelijke alternatieven.

#### Verslag FSE BO voorjaar 2017

Study Group:

Het College gaat het contract met Study Group vanwege het leveren van onvoldoende kwaliteit, het niet nakomen van afspraken en het ontstaan van reputatieschade voor de RUG opzeggen. Men vraagt of het FB hier mee kan instemmen. ██████ geeft aan dat FSE ook niet tevreden is over Study Group en dat men kan instemmen met het opzeggen van het contract.

Afgehandeld.

#### Quickscan FEB BO najaar 2017

Vervolgacties na verbreking contract Study Group:

Uit BO voorjaar '17: "FEB wordt betrokken bij mogelijke alternatieven."

Vraag aan CvB: wat is de status hiervan?

Pre-university Foundation: As a result of the non-renewal of the Studygroup contract, the Board has asked ISR (██████) to examine various options and opportunities for providing pathways for prospective undergraduate students, this consultation with stakeholders (including FEB) is ongoing and will result in policy advice to the CvB (for their decision) in the coming months.

#### Verslag FEB BO najaar 2017

Vervolgacties na verbreking contract Study Group:

Het Bureau is doende een alternatief voor Study Group te realiseren. Een mogelijkheid is om zelf in Groningen iets op te zetten. FEB wordt op de hoogte gehouden.

Afspraak: FEB wordt op de hoogte gehouden over de plannen.