

New routes to higher education: the global rise of foundation programmes

The world's first global mapping
of an expanding market



Executive summary

In this report, StudyPortals and Cambridge English present the first global overview of English-medium foundation programmes. The findings are based on data from StudyPortals' Preparation Course database, which is estimated to account for 70% of all English-medium foundation programmes, as well as desk research and insights from industry experts.

Key features of the English-medium foundation programme market

What is a foundation programme?

Foundation programmes prepare students for undergraduate study. They tend to have four main components: academic content, English language preparation, study skills and cultural adaptation.

What are these programmes called?

It is not straightforward to identify foundation programmes, as there is no standardisation in the naming and set-up of these programmes. However, the name used most frequently in the industry is 'foundation programme', which we use throughout this report.

What are the entry requirements?

Applicants must show proof of academic credentials, usually in the form of a high school certificate or completion of a number of years' education, and proof of English language ability, usually in the form of an IELTS, Cambridge English: First¹ or TOEFL certificate.

What are the English language requirements?

Most students would not meet their undergraduate requirements without some form of English language preparation. Most foundation programmes require a minimum IELTS score of 4.5–5.5, whereas most undergraduate programmes require higher scores of 6.0–7.0².

What academic disciplines do students study?

Two academic disciplines account for over half of all programmes: Business and Economics (32% of all programmes), and Engineering and Technology (21%).

What qualifications do students get?

There is no formal qualification on completion of a foundation programme. In most cases, foundation

programme providers form partnerships with universities that allow students progression to an undergraduate degree.

How much do programmes cost?

The highest annual fees are in native English-speaking regions, including North America (US\$22,000), the UK (US\$18,000) and Oceania (US\$16,900), which are roughly double the annual fees in Asia (US\$8,430) and Continental Europe (US\$9,206).

How many programmes are there worldwide?

There are currently over a thousand English-medium foundation programmes worldwide.

Where are these programmes located?

Over 90% of programmes are provided in English-speaking regions, with almost two thirds of programmes in the UK, 16% in Oceania and 12% in North America.

Who provides these programmes?

Most programmes are provided by universities or by corporate provider–university partnerships. The five biggest corporate providers – Cambridge Education Group, INTO University Partnerships, Kaplan International Colleges, Navitas and Study Group – provide almost half of the programmes worldwide.

What is the global value of the market?

The market has an estimated global value of US\$825 million per year. This figure is based on tuition income from foundation programmes only.

The future of the market

The next anticipated growth market is Continental Europe, where English-medium degree programmes have more than tripled over the previous seven years³.

¹ Also known as First Certificate in English (FCE): www.cambridgeenglish.org/first

² www.cambridgeenglish.org/institutions

³ Wächter, B & Maiworm, F (eds.), 2014, *English-Taught Programmes in European Higher Education. The State of Play in 2014*, ACA Papers on International Cooperation in Education

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Introduction

Higher education has never been more global. In 2012, over 4.5 million students⁴ went abroad to study, up from 2 million in 2000⁵.

However, accessing international education is not straightforward. There are vast differences in school education systems around the world and students require a high level of language proficiency to cope with the demands of higher education.

As a result, there are now over 1,000 English-medium foundation programmes worldwide. These programmes help students to bridge gaps in their academic knowledge, language proficiency and study skills, and ultimately, win a place in an English-medium degree programme.

In this report, Cambridge English and StudyPortals present the world's first global overview of the number and type of programmes that are available and the direction of future market growth.

We hope that our findings help higher education institutions and their partners see the possibilities and benefits that foundation programmes offer. Furthermore, we hope this report will be a basis for further in-depth research, allowing us to monitor ongoing trends in this fascinating segment of international higher education.

⁴ Institute of International Education, 2014, Open Doors Presentation, www.iie.org/-/media/Files/Corporate/Open-Doors/Open-Doors-2014-Presentation.ashx?la=en

⁵ UNESCO Institute for Statistics, *Global Flow of Tertiary-Level Students*, www.uis.unesco.org/Education/Pages/international-student-flow-viz.aspx

Findings

What is a foundation programme?

Foundation programmes prepare students to study at university. They tend to consist of four main components:

1. Academic content

Students learn the basics of their prospective undergraduate degree. Students may work on a specific area, like improving their mathematics, or study a subject more broadly. The exact study content may depend on the student's country of origin, as differences in educational systems will determine whether specialisation for a degree has started at high school, or is expected to start at university.

2. English language preparation

Foundation programmes offer English language preparation to enable students to meet undergraduate degree entry requirements. Without this preparation, many students would not meet their university's requirements or succeed in their academic studies.

3. General study skills

General study skills are taught to help students from different backgrounds understand how academic study works in a different country. Study content may include:

- how to process academic information (e.g. scientific evidence, critical thinking)
- study methodologies (e.g. how to avoid plagiarism)
- how to write a paper and how to present
- how to interact in class (e.g. in some cultures asking questions is discouraged, in others it is viewed as the best way to learn something).

4. Cultural adaptation

Foundation programme students are generally high school graduates around 17 or 18 years of age. Coming to a new country alone, with no experience of a different culture, can be a huge challenge. Foundation programmes provide an environment where like-minded people meet in a relatively safe environment, helping students deal with homesickness and culture shock.

Different set-ups

Most foundation programmes are intensive study programmes, with attendance monitoring, mentoring and plenty of weekly contact hours to ensure that students matriculate into their intended university. However, there are multiple ways that this type of support is set up.

A one-year foundation programme

In most cases, a foundation programme is a one-year programme, after which the student enrolls in an undergraduate degree.

A customised foundation programme

In some cases, the content and duration of a foundation programme are adapted to match the student's level. Some students may need only a limited selection of additional modules meaning that they can enrol in their matriculation degree sooner (for example, after only half a year of foundation study).

Extra classes during the first year at university

In some cases, the university or the foundation provider delivers a guided first year, often called an 'international year one'. Students are admitted to their undergraduate degree programme with lower entry requirements and take extra classes to reach a higher level of English language proficiency and learn essential study skills. After a year of guided studying they are enrolled in the normal year two of university.

Naming issues

It is not straightforward to identify foundation programmes by name alone, as there is no standardisation in the names used to describe these programmes. The list below illustrates how foundation programmes are described in many different ways.

The most commonly used words in foundation programme names:



Foundation	University	Life
International	Diploma	Months
Pathway	Level	One
Undergraduate	Science	Diploma
Programme	Studies	Finance
Business	Extended	Arts
English	Engineering	Year
Preparation	General	Law
Finance	Tourism	Standard
Computer	Design	Course
Technology	Certificate	Media
Humanities	Mathematics	

However, there are some trends.

Most programme names have two parts.

Firstly, a description of the type of programme (i.e. foundation programme) and secondly an academic discipline.

The following terms are most commonly used to describe the type of programme:

- 'Foundation programme' is used in 18% of all names
- 'Foundation year' is used in 13% of all names
- 'Undergraduate pathway' is used in 10% of all names.

Some names state the qualification that can be achieved: 'Diploma' is used in 12% of all names and 'Certificate' in 9% of all names. Many names also make it clear that the programme is focused on international students, with the word 'International' used in 38% of all names.

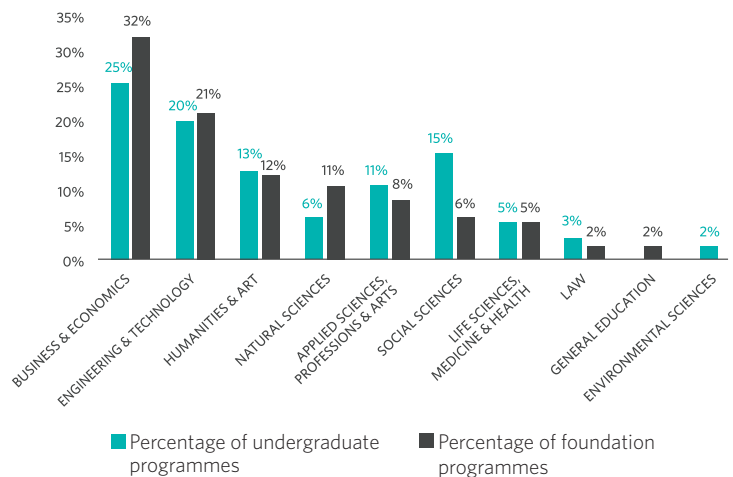
In terms of academic disciplines, the most common words used are: 'Business', 'Engineering' and 'Science', which occur respectively in 17%, 12% and 10% of all names.

Which subjects do students choose?

Almost all foundation programmes prepare students for a specific area of study. Two main disciplines account for just over half of all foundation programmes: Business and Economics (32%) and Engineering and Technology (21%). These same two disciplines account for just under half of all international students on undergraduate programmes.

Graph 1:

The most popular academic disciplines of foundation and undergraduate programmes



Insights from industry experts

Studying abroad is expensive and international students want a return on their investment. Students believe that a degree in Business or Engineering increases their chances of getting a return on their investment. Humanities and Arts programmes tend to have a higher proportion of students from more prosperous countries of origin.

What are the entry requirements?

Foundation programmes have two main entry requirements, similar to undergraduate programmes:

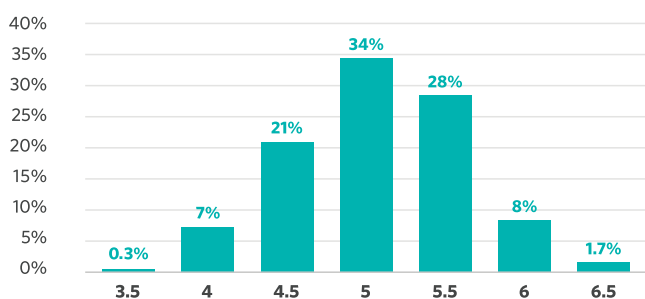
- an English language requirement
- an academic requirement.

English language requirement

The most commonly requested English language tests, used as proof of English language ability, are IELTS, Cambridge English: First (FCE) and TOEFL. Most foundation programmes require applicants to have a minimum IELTS score of 4.5–5.5, equivalent to Levels B1–B2 on the Common European Framework of Reference for Languages (CEFR)⁶.

Graph 2:

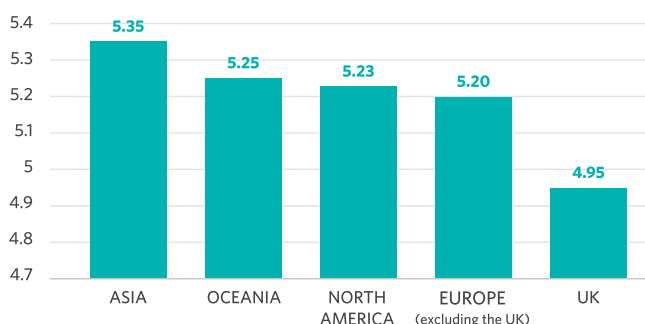
Minimum required overall IELTS score



Foundation programmes in the UK tend to have the lowest English language entry requirements, with an average minimum IELTS score of 5.0, compared to 5.2 in North America and 5.3 in Oceania.

Graph 3:

Minimum overall IELTS score required in different regions



⁶ www.cambridgeenglish.org/cefr

Academic requirement

Proof of academic credentials is usually required in the form of a high school certificate. Most institutions have a list of minimum scores required per country/educational system. Alternatively, institutions may simply ask students to have completed a certain number of years in education.

In some cases, foundation programmes are open to students who have completed 12 years of education in any system, including students from countries like the UK who have not completed their full pre-university education.



Insights from industry experts

Differences in educational systems are one of the main reasons for the existence of foundation programmes. Some countries have 12 years of pre-university education, followed by 4-year undergraduate degrees. If these students want to go to university in a country which has 13 years of pre-university education followed by a 3-year undergraduate degree, they will usually be required to take a foundation programme.

What qualification do students get?

There is currently no formal qualification obtained on completion of a foundation programme. Therefore, at the end of the programme students are officially in no better position to apply to universities. This could cause problems in countries with strict visa regulations. Students who do not immediately find a university that accepts their foundation programme may have to leave the country.



Insights from industry experts

In most cases, foundation programme providers form partnerships with universities that allow students progression to an undergraduate degree. Furthermore, consortia of universities tend to accept each other's foundation programmes. For example, the Northern Consortium of UK universities (NCUK) and The Group of Eight (in Australia) have agreed to accept each other's programmes. Agreements like this significantly lower the risk that a student will not gain admission to undergraduate study on completion of their foundation programme.

How much do programmes cost?

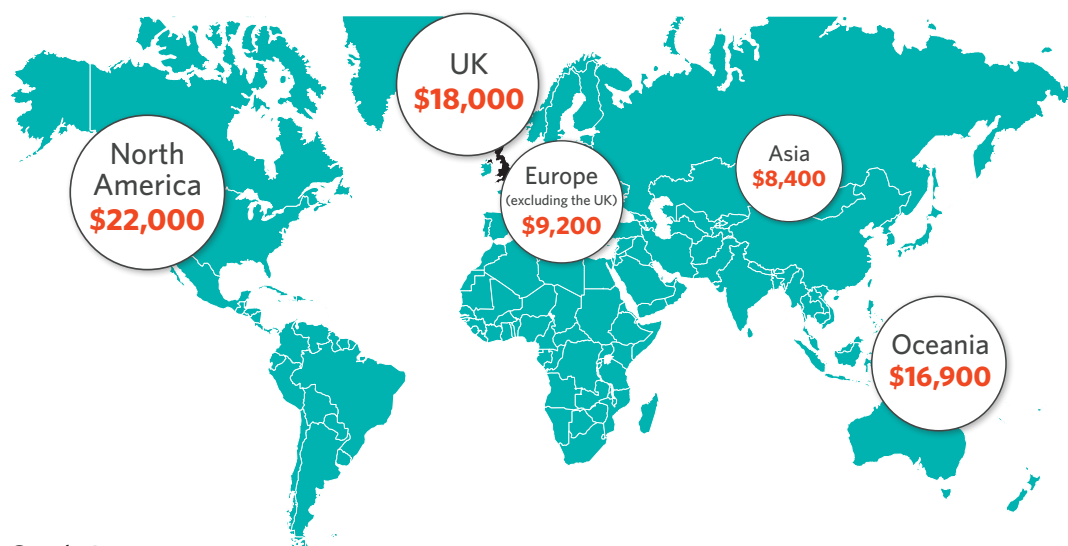
Most programmes only have one fee: an international tuition fee for all applicants. To allow for comparison across regions, fees were adjusted to reflect the cost of a full academic year of education in US dollars⁷.

The lowest fees are in non-native English-speaking regions where corporate providers are less common. The average yearly fee in Asia and Europe (excluding the UK) is US\$8,000-US\$9,000.

In markets where corporate providers are prevalent (the UK and Australia) the average yearly fee is twice as high. However, the highest fees are in North America (US\$22,000), which perhaps indicates that higher fees are associated with English-speaking regions.

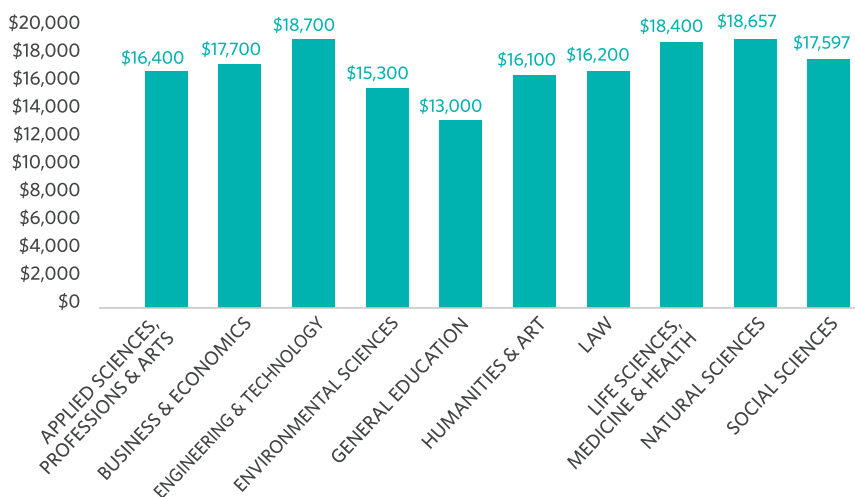
Map 1:

The average cost of a year of foundation education by continent in US\$



Graph 4:

Average cost of a year of foundation education by discipline in US\$



⁷ XE.com exchange rates on 29 April 2015: 1 GBP (£) = 1.54107 USD (\$), 1 EUR (€) = 1.10577 USD (\$), 1 AUD (\$) = 0.80323 USD (\$). Other currencies were not used in these calculations.

Fees per academic discipline

The academic disciplines with the highest fees are Life Sciences and Medicine, Natural Sciences, and Engineering, possibly because of the need for laboratories and other practical equipment.

The lowest fees are for General Programmes. On average, these programmes charge US\$13,000 per year, compared to US\$18,700 for Engineering and Technology programmes.

Our desk research indicates that General Programmes are mostly provided by small colleges or universities. Some of these programmes are actually not 'general' as students are still asked to choose a discipline when they start their studies. They are simply 'general' in terms of how the provider chooses to market the programme.

How many programmes are there worldwide?

Worldwide, there are 1,192 English-medium foundation programmes, as listed in January 2015 on PreparationCoursesPortal.com, the specialised web portal published by StudyPortals.

There is an average of three programmes per institution, with most institutions offering just one programme. However, a number of providers offer significantly more programmes for more than one university (spoke-to-hub model).

The number of programmes that can be identified is influenced by the different ways in which institutions market their programmes:

- Standard length and accelerated length programmes can be marketed as one programme or two programmes. Accelerated programmes are basically the same programme, but may have slightly higher entry requirements and altered content.
- Some institutions market one programme, in which the student can then select different modules to determine the exact study content, whereas others market multiple programmes, with modules and study content pre-chosen by the institution.

Who provides these programmes?

The foundation programmes we have described in this report are mainly provided by universities, or by corporate providers in direct partnership with universities.

1. Universities and corporate providers

In most cases, a corporate partner takes on the right to deliver programmes on the university campus. Some corporate providers invest in new campus facilities (joint-venture approach) and some use their own centre facilities. In most cases, the corporate provider takes responsibility for student enrolment, marketing and teaching, and the university plays a role in the quality assurance and curriculum approval of the programme.

2. Colleges, language schools and other providers

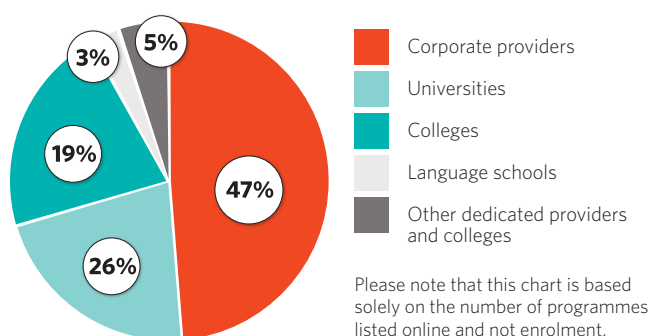
Some universities recognise external foundation programmes, rather than deliver programmes themselves, and offer a requirements waiver if a certain score is reached. These programmes are usually delivered by colleges, language schools or small dedicated schools.

Market share

Almost half of all foundation programmes are delivered by just five corporate providers: Cambridge Education Group, INTO University Partnerships, Kaplan International Colleges, Navitas and Study Group.

Foundation programmes delivered by corporate providers are most common in the UK and Australia, but are also found in Continental Europe (the Netherlands) and the United States.

Chart 1:
Foundation programme market share by provider type

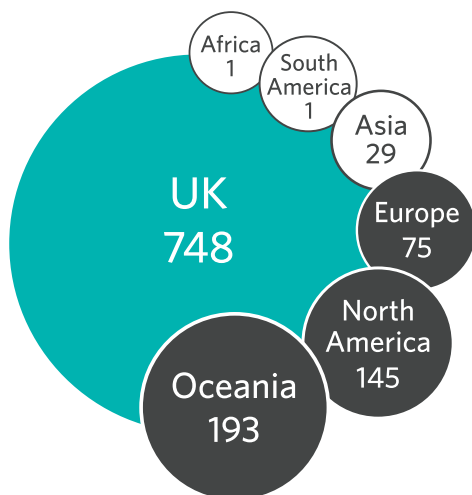


Where are programmes located?

Most foundation programmes are located in English-speaking regions. The UK is the most common location with 63% of all programmes, followed by Oceania (16%) and North America (12%).

Diagram 1:

Foundation programmes per continent, with the UK reported separately



Insights from industry experts

Most English-medium foundation programmes are in English-speaking countries because they have more English-medium undergraduate degrees, which is where students will matriculate.

A number of other factors influence the occurrence of English-medium foundation programmes, such as:

- government policies regarding the provision of English-medium programmes
- whether institutions are allowed and willing to charge tuition to international students
- visa regulations
- capacity to teach programmes in English
- perceived market demand.

What is the global value of the market?

The English-medium foundation programme market has an estimated global value of US\$825 million per year. This estimation is based on extrapolation of data provided by market experts, and our own desk research. The dataset, which is used in this report, is estimated to account for 70% of all English-medium foundation programmes worldwide.

How do foundation programmes benefit universities?

Ultimately, foundation programmes help universities by delivering fully prepared, high-quality, international students into undergraduate degree programmes.



Insights from industry experts

Industry experts identified the following benefits for universities:

- Universities attract students who are ready to make the most of their education and who will perform better in their university studies.
- Universities can enrol greater numbers of students, compared to the number of students who can be enrolled through the university's governmental funding alone.
- Enrolling greater numbers of international students provides a multicultural classroom experience.
- Students who progress to an undergraduate programme will pay three to four years of international fees. This income can be used to invest in research and provide facilities.

Future of the market

The foundation programme market is predicted to grow further, mirroring the direction of the overall global tertiary education market. Overall, global tertiary enrolments are forecast to grow by 21 million between 2011 and 2020: a 1.4% increase per year. However, the previous two decades saw a 5% annual growth, indicating that the sector is beginning to slow down⁸.

The key market trends include increasing student enrolments and international mobility, and growing competition amongst universities and governments worldwide to recruit international students.

Growth region

One potential growth market is Continental Europe, where English-medium degree programmes have more than tripled over the last seven years⁹. Furthermore, the growth in English-medium undergraduate and Master's programmes has accelerated in recent years, from 725 programmes in 2001, to 2,389 in 2007, to 8,039 in 2014⁹.

The highest growth has occurred in Nordic, Baltic and Central Western countries, with lower growth in Southern European countries. In absolute terms, the largest number of English-medium programmes is in the Netherlands (1,078), followed by Germany (1,030), Sweden (822), France (499) and Denmark (494).

Table 1:

Overview of European English-medium programmes

		Nordic	Baltic	Central West	Central East	South West	South East
Number of English-medium programmes	2014	1,931	345	2,771	966	1,362	714
	2007	508	56	1,307	204	141	173
Proportion of institutions with English-medium programmes	2014	61%	39%	45%	20%	17%	18%
	2007	32%	25%	23%	20%	8%	21%
Proportion of students in English-medium programmes	2014	5.3%	1.7%	2.2%	1.0%	0.8%	1.3%
	2007	1.7%	0.8%	1.2%	0.4%	0.8%	0.7%



Insights from industry experts

All the interviewed experts believe that the foundation programme market is still growing. The next anticipated growth markets are the United States and non-native English-speaking countries offering English-taught programmes.

In terms of non-native English-speaking countries, Continental Europe is seen as the most likely growth area, as there are many high-profile universities where international students are interested in studying. Countries to watch include the Netherlands, Germany and the Nordic countries. Bigger countries, with more universities, will inevitably have a larger presence in the market.

Countries of origin for international students

Due to demographics, by 2020 just four countries will account for over half the world's 18-22 year-old population: India, China, the US and Indonesia. In absolute terms, China is expected to have the most outbound students (585,000), followed by India (296,000) and South Korea (134,000).

However, China's contribution to outbound student enrolments is slowing down. The biggest drop in outbound student flows is forecast to be students from China going to the US, Japan and the UK. In contrast, India is forecast to be the largest growth area with an increase of 71,000 between 2011 and 2020, followed by Nigeria, Malaysia, Nepal, Pakistan, Saudi Arabia and Turkey¹⁰.

⁸ British Council, 2012, *Higher education global trends and emerging opportunities to 2020*

⁹ Wächter, B & Maiworm, F (eds.), 2014, *English-Taught Programmes in European Higher Education. The State of Play in 2014*, ACA Papers on International Cooperation in Education

¹⁰ British Council, 2012

Tertiary education in other countries

In 2012, nearly half of all outbound students went to five countries: the United States (18%), UK (11%), France (7%), Australia (6%) and Germany (5%). However, the top five have seen their share decline from 55% in 2000, to 47% in 2012. There is a shifting balance towards regional hubs¹¹.

Between 1999 and 2012, the proportion of outbound students studying within their own region increased in Arab States from 12% to 26%, in Central and Eastern Europe from 25% to 37%, and in Sub-Saharan Africa from 18% to 28%. In Asia, China alone has an inbound international student growth target of approximately 500,000 students by 2020¹².

“Other countries play an important and increasingly large destination role at regional level: South Africa (Sub-Saharan Africa); Singapore, Hong Kong and Malaysia (South East Asia); and South Korea (North East Asia) ... Given increased investments in higher education and excess capacity in countries with less favourable demographics, it is possible in the long run that countries like China, Singapore, Malaysia and some Gulf States will become the fastest growing study destinations.”

British Council, *Higher Education Global Trends and Emerging Opportunities to 2020*

Tertiary education in other languages

Any such shifts towards non-native English-speaking countries may be a limiting factor on the growth of the English-medium market. On the other hand, this might suggest that there is an opportunity to provide foundation programmes in other major world languages, such as Chinese and Arabic.



Insights from industry experts

The interviewed experts feel that there is an opportunity to teach foundation programmes in other languages, but they believe that this market will be much smaller than the English-medium foundation programme market.

The experts believe that the most widely spoken business languages (such as English, Chinese and Spanish) will be the most in demand, as international students tend to make study choices based on the potential return on investment for their future career.

Immigration policies

The future growth of the market is also highly influenced by visa requirements.

A recent study found that tightened immigration in the United States and Australia resulted in significant reductions in international student enrolments¹³. Monash University in Australia, for example, saw a 30% drop in demand for its preparation college. Overall, Australian universities expected a 25% reduction in overseas admissions, which led to the Australian government retracting some of their immigration changes.

Similarly, following changes to UK immigration policy which came into effect on 6 April 2015, non-EU student numbers fell for the first time since such statistics have been gathered, and there was a significant decline in some key international student markets: India (dropped 49% in two years), Pakistan (-38%), Saudi Arabia (-35%)¹⁴.



Insights from industry experts

One factor which experts do not see as a threat is e-learning.

The experts do not see how online programmes can compete with face-to-face study, as many aspects of foundation programmes, such as cultural adaptation, would be more difficult to grasp via e-learning. The experts also believe that e-learning programme completion rates would be significantly lower as it would be easier to neglect studies without the one-on-one support that face-to-face foundation programmes offer.

¹¹ UNESCO Institute for Statistics, Global Flow of Tertiary-Level Students, www.uis.unesco.org/Education/Pages/international-student-flow-viz.aspx

¹² ICEF monitor, Number of Chinese outbound students up by 11% in 2014, <http://monitor.icef.com/2015/03/number-of-chinese-outbound-students-up-by-11-in-2014>

¹³ British Council, 2011, *Impact of visa changes on student mobility and outlook for the UK*

¹⁴ Universities UK, *A policy to attract qualified international students and staff to the UK*

Appendices

Methodology

The findings in this report are based on the following StudyPortals data:

Table 2:
Data collection techniques

Data collection techniques	
Semi-structured interviews with five industry experts	In-depth qualitative understanding of the market. Semi-structured approach to frame the experts' insights in a way that could be benchmarked to one another.
Analysis of data from StudyPortals Preparation Course database <i>PreparationCoursesPortal.com</i>	Information about the number and types of programmes. Most of this data comes directly from programme providers, complemented by StudyPortals' desk research.

Foundation programme selection criteria

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

Table 3:
Criteria used to identify foundation programmes

Criteria to identify foundation programmes	
A: Progression to university	The programme is provided by an institution that provides at least one undergraduate degree programme itself. Or the provider offers at least one foundation programme and has at least one university partnership.
B: Duration	Minimum: half an academic year. Maximum: two full academic years.
C: Entry requirements	Entry requirements are lower than for the progression degree.
D: International	The programme is aimed at international students.
E: 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:

- Webpages in languages other than English were not considered.
- Some websites do not publish all information openly; any such data was not considered.
- Data was collected within a selected timeframe. Institutions may have since added programmes, changed requirements or discontinued programmes.
- The inclusion of programmes in the research depended on their online presence and findability, which limits the representativeness of the research.
- The different ways in which institutions name and market their programme influence the number of programmes that can be identified.

The methodology choices impose some constraints, which 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

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Contributing partners



About StudyPortals

StudyPortals is the international study choice platform with over 2,100 listed institutions in 67 countries. We publish eight portals with the objective of making study choices transparent. Students can access over 55,000 study programmes. In 2014, we had over 9 million visits to our site.

For more information: www.studyportals.com

Our mission is to empower the world to choose (for) 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 60,000 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 1,000 universities listed by the end of 2015.



For more information about how StudyPortals can help higher education institutions, go to www.studyportals.com/institutions



For more information about foundation courses, go to www.preparationcoursesportal.com



About Cambridge English

Cambridge English Language Assessment is a not-for-profit department of the University of Cambridge and the trusted name behind the most valuable range of qualifications for learners and teachers of English in the world. We are the producers of Cambridge English: First, Advanced and Proficiency, as well as IELTS, which is co-owned and managed with British Council and IDP: IELTS Australia. Over 5 million people a year take Cambridge English exams and our qualifications are accepted by more than 20,000 organisations worldwide.



For more detail on how Cambridge English exams match up with the CEFR, go to www.cambridgeenglish.org/cefr



For more information about our exams for higher education, go to www.cambridgeenglish.org/exams/academic-and-professional-english

Why choose Cambridge English exams?

Cambridge English exams can open up a world of study, work or travel opportunities. These high-quality international exams are:

- backed by over 100 years of expertise in English language assessment
- designed to develop practical English language communication skills for career and study success
- extensively researched by one of the world's largest dedicated language research teams
- supported by a wide range of resources, including official Cambridge English preparation materials.

English exams for learners of all levels and needs

All our exams are aligned with the Common European Framework of Reference for Languages (CEFR) – the internationally accepted standard for describing language ability – and each is targeted at a different level.

