



International Education Scanning Report

July 2014



NEW ZEALAND
EDUCATION

ThinkNew[®]

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Education New Zealand (ENZ) has contracted Education Directions (ED) to provide this monthly scanning report of the international education environment. The purpose of the reports is to develop a better shared understanding of the international education industry. Reports are intended to facilitate, not lead, discussion.

Feedback is welcome - contact Dave Guerin (ED) Directions, at 0800 500 552 or dave@ed.co.nz. If you wish to contact ENZ, please contact the Business Development Team ebd@enz.govt.nz.

July 2014 Executive Summary

Markets

1. Germany's annual statistics are out. It is one of the major destination countries for foreign students, but it also achieves high outwards mobility. About half of the foreign students stay on in Germany.
2. The British Council released an attractive online tool showing student mobility to and from the UK.
3. A study on international students in US high schools is apparently the first of its type. Numbers tripled in the last decade, but are concentrated in private schools (they can only enrol for 1 year in most public schools).
4. The number of students in international schools worldwide went up 9% in 2013-14.
5. A review of Gulf Cooperation Council education markets should be read by those targeting the area.
6. Transnational education is apparently not a direct substitute for students travelling to other countries, but there is a relationship.

Government

7. Germany released a comprehensive strategy for engaging with Africa for education and research, complementing a May-June German strategy on education collaboration with sub-Saharan Africa.
8. The Dutch Minister of Education, Culture and Science laid out a clear strategy for international VET and higher education to her Parliament. A new scholarship scheme will promote mobility to and from the Netherlands, while quality institutions will be encouraged into transnational education.
9. Russia allocated funds to help get 5 of its universities into the world's top 100 universities.
10. The British Council had a very critical external review of its operations with the most serious concerns being about conflicts between its commercial and diplomatic/trade promotion activities. A structural split seems likely to separate the activities.
11. The furore over English testing rorts continued in the UK, after a number of institutions had visa privileges suspended in late June.
12. The US has already met its target to have 100,000 students studying in China by the end of 2014.
13. Turkey is achieving high growth in overseas applications for its scholarship scheme.
14. The US had a hiccup with their visa processing software, while President Barack Obama threatened executive action to get around an immigration legislation roadblock.
15. The UK tightened criteria for highly trusted sponsor institutions – the allowable visa refusal rate dropped from 20% to 10%. Graduate pathways were also further restricted.
16. A Japan-Australia agreement reduced trade barriers.

Markets

Market Size and Value

Germany The German Academic Exchange Service (DAAD) published its latest annual data on international students in [short](#) (20 pages) and [long](#) (155 pages, German and English) forms. Some key points are summarised below, but the long report, in particular, has a lot more material (including a special section on USA-Germany mobility). It might be the most comprehensive set of data on international students for any one country.

- International higher education student numbers in Germany grew by 55,000 to 282,000 between 2003 and 2013, but their proportion of all students dropped from 11.7% to 11.3%.
- Looking at foreign students who completed high school outside of Germany (called *Bildungsauslaender*), the country relies on a wide range of markets for its students (see figure below). China, the largest source of foreign students, only supplied 13% of students (the next three countries were Russia, Austria and India). The largest percentage growth in student numbers from 2012 to 2013 was in Bangladesh (29% growth), India (21%), and Brazil (18%).

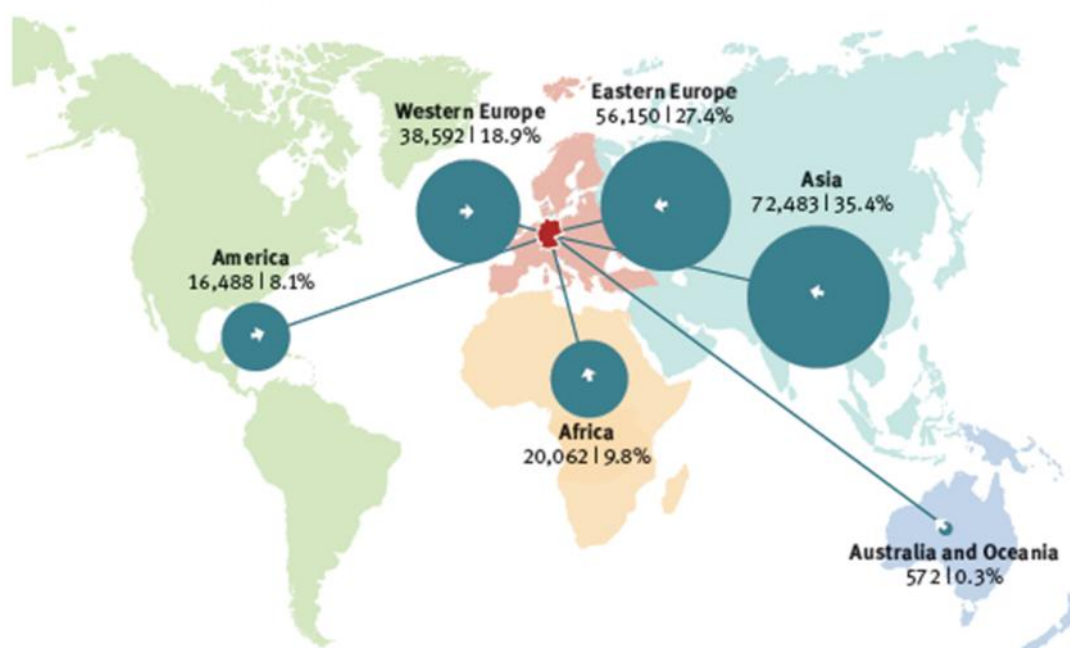
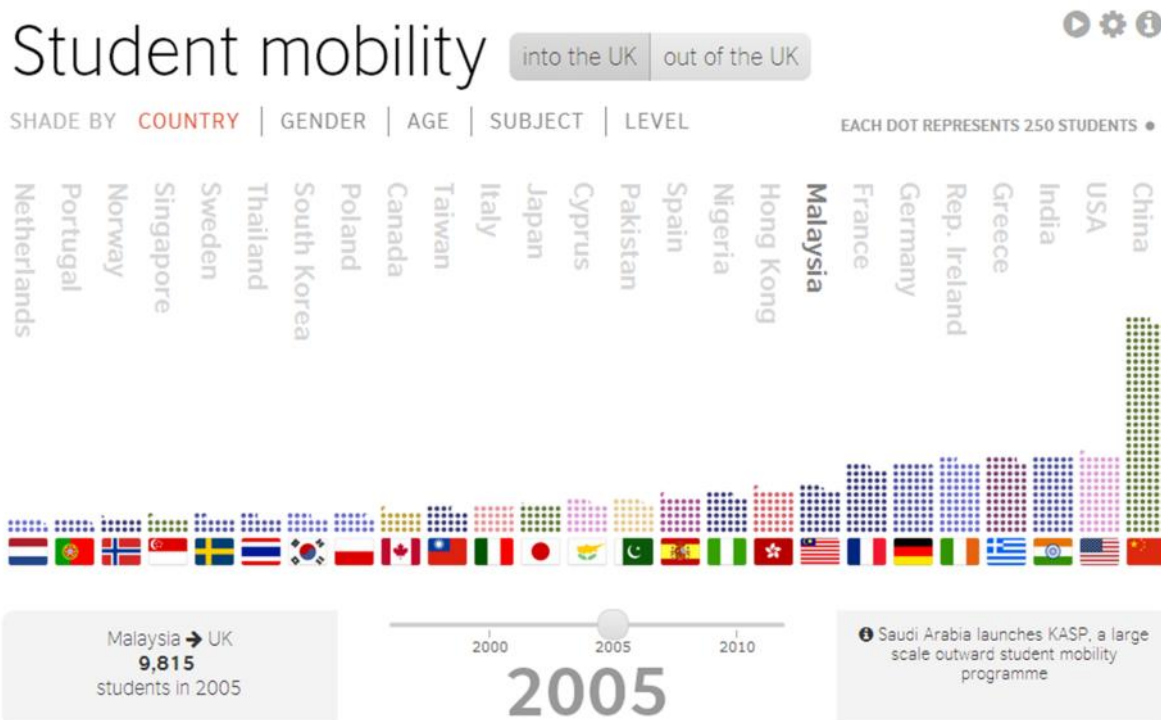


Figure 1 - *Bildungsauslaender* in 2013 by region of origin, number and percentage

- Engineering studies attracted 26% of *Bildungsauslaender*s, while 25% took law, economics and social sciences.
- A survey of 11,000 foreign students showed that over half planned to stay in Germany, while other research showed that about half of foreign students over the previous decade had actually stayed on (an impressive correlation). The survey also explored settlement outcomes.

- About 30% of German students study overseas for at least 3 months, beating the EU target of 20% by 2020 (Germany has a 33% target). Many of those students don't travel far, with 67.8% in Austria, the Netherlands, the UK, Switzerland or France in 2011. Just 1% went to New Zealand.
- Languages and cultural studies students were most likely to study abroad, while engineering students were least likely to do so.
- The share of foreign academic staff is slowly rising, but it was still only 10% in 2012, up from 8.8% in 2006. The report also looked into the source and destination countries of academic staff on exchanges to and from Germany.
- A global comparison of major host countries over the 2001-2011 period shows that China, Canada and India have gained most market share, while the USA, Germany and France have lost the most market share. All grew their student numbers.

UK The British Council launched [an interactive tool that illustrates inbound and outbound student mobility between 1996 and 2012](#). It shows the rise of India and China as core markets over the period.



United States IIE released [a 40-page report on international students at US high schools](#) ([Inside Higher Ed](#)), funded by the US Dept of State. It is apparently the first major study on that group of students. It is a useful report for its examination of secondary school students, including comparisons with other countries, but it did not explore students' pathways into other sectors.

- The number of permanently enrolled international students in US high schools (as opposed to exchange students) tripled between 2004 and 2013.
- While two thirds of these secondary students were seeking a high school diploma, the other one third were exchange students (66% of them came from Europe, and 9% from South America).

- For those seeking a high school diploma, 46% were from China alone. Few came from India or Saudi Arabia, which are major US postsecondary markets.
- Diploma-seeking students mainly enrol on the East or West Coast, while the most popular region for exchange students is the Midwest.
- Visa conditions mean that most international students can only enrol in public schools for 1 year, so 95% of diploma-seeking students enrol in private schools.
- While the USA hosted more international high school students than other Anglophone countries (comparisons were made with Australia, Canada and the UK¹), they only made up 0.5% of all high school students.

The high school market was seen as a good source of well-prepared students for higher education institutions. High schools were advised that enrolling international students could benefit internationalisation efforts at schools, but that diploma-seeking students would probably only be sourced from a few countries. There was also a warning not to lose focus on exchange students.

Other countries should keep an eye on any changes in visa policies that enable public schools to enrol more international students – it would create a large number of new competitors.

International Schools An International School Consultancy Group (ISC) 2014 Global Report says [the number of students attending international schools worldwide increased by 8.4% to 3.6m in 2013-14](#), generating annual tuition fee income of US\$36bn. Asia is the fastest growing market and notable growth countries included UAE, China, Hong Kong, and Qatar.

Snippets

- **Taiwan** A record number of mainland Chinese students [enrolled at Taiwanese tertiary institutions this year](#) (but still only about 2,600).
- **Australia** [923 Nigerians were studying in Australia at the end of May](#), nearly double the number at the same time last year. The University of New South Wales has a permanent representative there now. English language schools experienced [substantial growth in 2013 after a number of lean years](#), with [Indian enrolments also up 267% in the year to May 2014](#) (off a low base, and driven by packaging with higher education courses).
- **UK Applications** Non-EU applications for full-time undergraduate programmes in the 2014/15 academic year [were 6% up on the previous year](#) as at 30 June 2014 ([detailed stats](#)). Applications from Malaysia rose 28%, after 26% growth last year.

Market Events & Commentary

GCC Alpen Capital [reviewed the education market in the Gulf Cooperation Council](#) (97 pages), and it should be read by those operating in the area. It covers the UAE, Saudi Arabia, Qatar, Bahrain, Oman and Kuwait markets, including profiles of major companies, as well as recent mergers and acquisitions. While growth is expected, challenges included mismatches between graduate skills and the labour market, education inflation (especially given governmental fee controls), and staff shortages. Private

¹ NZ had 13,415 international fee-paying students at secondary school in 2013 (nearly 5% of all secondary students), almost as many as in Australia, and one sixth of the US total.

schools are growing strongly, while tertiary education students in the region are apparently turning to Dubai ahead of the UK (the US and France were still in front as destinations). Quality institutions and easy access to student visas are seen as key reasons for the area's emergence as an education hub. Research capabilities are improving in tertiary education, while technology subjects are at the top of government's priority lists.

Universaria The 3rd [Universaria](#) international presidents' meeting was held in late July, bringing over 1,000 higher education leaders together from Latin America and the Iberian Peninsula. The Santander banking group is a major backer of Universaria, and [announced a €700m investment in university projects over the next four years](#). 40% will fund scholarships to improve international mobility, 30% will "foster research, innovation and entrepreneurship at universities", and 30% will support the modernisation and incorporation of new technologies in universities. Santander also reported back on [their strong progress towards a 2010 pledge to invest €600m](#). At the same meeting, the top universities in Mexico, Argentina and Brazil [signed an academic cooperation agreement](#).

Snippets

- **India** SkillTree [launched the 'Great Place to Study – India Edition' initiative in London](#) to promote study in India ([promotional website](#)). SkillTree [offers a wide range of services](#) to private higher education providers in India, including entrance exams. Meanwhile, the London Universities International Partnership [is promoting study by Indian students](#). Education NZ [analysed India's recent national budget](#).
- **China** Education NZ [reviewed the first half of 2014 in the Chinese market](#) (12 pages). A wealthy Chinese couple are setting up [a US\\$100m endowment to send underprivileged Chinese children to elite global universities](#). They started with a US\$15m gift to Harvard.
- **Japan & Australia** An Austrade survey of Japanese agents [predicted demand for Australia's educational institutions will continue growing](#), if institutions keep up their game.
- **Navitas** The education services company Navitas started July well, with an [English language teaching deal with a Western Australian institution](#). Its [share price dropped 30%](#), however, a few days later when Macquarie University announced it would end a partnership with Navitas that made up 18% of Navitas' students. Later in the month it reported an [annual profit that was 31% lower than the previous year](#).
- **NZ & Sports** The New Zealand and Japanese Prime Ministers [launched an English language and sport programme](#), Game on English, to be offered in NZ and aimed at the Japanese market. NZ also [launched NZ-India Sports Scholarships](#). Study Travel Magazine reported on NZ secondary schools' [efforts to attract students with outdoor education programmes](#).
- **NZ Private Tertiary Education** A New Zealand private tertiary education association, ITENZ, commissioned an [Evaluation of NZ's PTE sector capabilities and capacity for engagement with export education markets](#) (121 pages). The report summarised survey results, but did not have detailed analysis or recommendations.
- **North Korea** The British Council [signed an MOU with North Korea](#) covering cultural matters, including education.
- **EU Exit** A UK consulting company [surveyed UK Vice-Chancellors](#) (a third responded). 38% saw declining demand from international students as a major constraint in the future, but 25% also saw

offshore programmes as a highly promising opportunity. Potential systemic shocks concerning VCs included the UK's possible departure from the EU, and the prospect of the Chinese government restricting student flows.

- **European Register** The European Tertiary Education Register (ETER) [published its first results](#) in early July, providing basic comparable data on 2,250 institutions in 36 countries.
- **Austria** A report by the Joanneum Research non-profit organisation [warned that Vienna is doing too little to attract international students](#). It compared Austria's limited international education efforts unfavourably to those in Denmark, Germany and the Netherlands.
- **UK Framework** The UK's Higher Education Academy released a [framework for internationalising higher education in the UK](#) (18 pages). It's a resource for reflection.
- **Mergers and Acquisitions** Ireland's Independent News and Media [sold private third-level college Independent Colleges Ltd and ELT operator International House \(IH\) Dublin](#). Two former directors of IH Dublin [acquired a 50% stake in Future Learning \(FL\) Ireland](#). Huron Consulting Group, which consults in higher education, [made a strategic investment in the parent company of Shorelight Education](#), a pathways programme provider.

Transnational Education

OBHE Report The Observatory on Borderless Higher Education (OBHE) [produced a report on the extent to which transnational education acts as a substitute to international student mobility](#) using the UK as a TNE-exporting country and Malaysia, Singapore, Hong Kong and China as TNE host countries. It found weak evidence for a direct substitute effect. Stories by [Times Higher Education](#) and [The PIE News](#) did note that outbound student numbers, or growth in such numbers, was declining as domestic capacity (including transnational education) in student source countries increased.

Snippets

- **Australia** Carnegie Mellon University's Adelaide campus [will be financially sustainable for the first time this year](#). It opened in 2006 and has benefitted from its US parent's support and Australian government grants.
- **China** Sichuan University and University of Pittsburgh [have begun constructing a joint institute for undergraduate education](#) in Chengdu – students may complete a degree in the US.
- **Local Values** A Chronicle of Higher Education opinion piece [explored the history around branch campuses, showing they were an issue in Africa 50 years ago](#).
- **Aberdeen University...is considering a South Korean campus**, focusing on the oil and gas sector.
- **English Teaching** Munich's Technical University (TU) [plans to teach most of its 99 Master's courses in English by 2020](#) (it offers 30 in English now). The article explored the wider debate.

MOOCs

Non-Western MOOCs A Fast Company feature looked at [the increasing proliferation of non-Western MOOCs](#) (admittedly using Western platforms).

Recruitment

Agent Surveys Education firm INTO [released results from a survey of 880 partner education agents and 2,000 students worldwide](#). While the UK, US, Australia, Canada and NZ were the top 5 locations to which agents sent students, Singapore, Malaysia and China were the next 3 locations. Agents felt most students had chosen a country, but not an institution, when they approach the agent. Agents saw university ranking and location as the most important aspects when choosing an institution. 94% of students rated their relationships with agents as good or very good.

Snippets

- **Argentina** Study Travel Magazine [surveyed six agencies in Argentina](#).
- **United States** Co-founder of the American International Recruitment Council (AIRC) Mitch Leventhal [said British and Australian recruitment practices are 10-15 years ahead of the US](#). The sticking points were limited use of agents, lack of convergence over agent contracts, and limited cross-border university relationships.

Study Pathways

- **Australia** The Department of Education published [a research paper on the study pathways of international students in Australia](#) (14 pages). It covered sectors and markets from a range of different angles.
- **English Scale** Pearson [launched a new numeric measurement of English language proficiency](#), using a scale from 10-90. They hoped it will become the global benchmark.
- **English on Campus** Study Travel Magazine explored [university-led ESL provision](#) (as opposed to using private pathway providers).

Retention and Achievement

United Kingdom The National Student Survey by Higher Education Funding Council for England (HEFCE) [found university students have become more satisfied over time](#). Non-EU students, and those from EU countries outside the UK, were more satisfied overall than UK students.

Post-Study Outcomes

- **Policy Changes** Study Travel Magazine examined [post-study policy changes in major destination countries](#) (UK, Canada, Australia, USA and EU countries).
- **MBA Students** International MBA students in the US [struggled to turn their degrees into US jobs](#).

Study Abroad

- **iMPACT Study** i-graduate released some details of its iMPACT pilot study looking at [the effectiveness of short-term study abroad experiences](#). The PIE News covered it but we can't find the report online.

- **Australia** The Department of Education produced a research snapshot [on outgoing international mobility of Australian university students](#).

Rankings and Indices

- **Citation Rankings** German research highlighted [the possible manipulation of secondary academic affiliations to affect university rankings](#). Saudi Arabia was one country that was alleged to appoint highly-cited foreign academics to lucrative secondary appointments, with limited requirements, in order to boost institutional rankings.
- **CWUR Rankings** Saudi Arabia's Center for World University Rankings (CWUR) [released its 2014 rankings of the top 1,000 universities](#) on 15 July. They don't use surveys or university-supplied data.

Government

Overarching Strategies

Germany The German Federal Ministry of Education and Research [published The Africa Strategy 2014-2018: Africa as a Partner in Education and Research](#) (36 pages). Some of the 30 planned measures for the next 5 years included:

- intensified research cooperation with Egypt and Morocco;
- exploring the establishment of a German-Tunisian university;
- pilot an automotive mechatronics programme at the German University of Cairo (which hosts the majority of Germany's offshore students);
- supporting the establishment of a South African vocational education institute;
- supporting the establishment of a Pan-African University in Algeria;
- creation of German Research Chairs in African universities; and
- various networking initiatives with universities and businesses.

The strategy is multi-faceted and is one of the stronger plans internationally for engaging with Africa, seen as a potentially large market for the future. Another German body, DAAD, also released a [7-page strategy paper on collaboration with sub-Saharan Africa](#) in May or June ([SciDev.Net](#)).

Netherlands Dutch Minister of Education, Culture and Science Jet Bussemaker outlined her "government's vision on the international dimension of higher education and VET" in a [19-page letter to Parliament](#) on 21 July. The main points are summarised below:

- A €5m pa scholarship scheme will be set up to mainly support study in the Netherlands by students from outside the European Economic Area (but also to support Dutch students to study offshore). Half the cost will be borne by institutions, which will also share the selection of students with Nuffic (A Dutch promotion and internationalisation body). Business involvement will be sought.
- Transnational education will be facilitated by passing the order in council required to activate 2009 legislation on transnational education. Only high quality institution will be allowed to participate, and there will be extra rules around quality assurance and use of public resources.
- The Nov 2013 *Make it in the Netherlands!* action plan has been progressed. It aims to close the gap between the many students who want to stay in the Netherlands, and the few who do so.
- Extra work is being done to increase Dutch students' mobility through funding and support.
- €4.5m will be spent to support internationalisation of VET.
- Two internationalisation bodies, Nuffic (higher education) and the European Platform (schools), will merge, while Nuffic's overseas offices will be restructured (there is a net reduction in funding for them).

The Dutch Minister's letter is coherent and detailed, providing a clear picture of the thorough approach being taken across government to support international education.

Russia The Russian government has announced it will [spend US\\$300m to support 14 universities to improve their quality](#). The funding supports a project started in May 2012, which aims to [get 5 Russian universities into the world's top 100 rankings by 2020](#) (website is in Russian). If you're interested in more detail on the "5/100 project", check out the [first issue of a new journal on Russian higher education](#), which focuses on the rankings goal.

British Council The Foreign & Commonwealth Office [published a Triennial Review report on the British Council](#) (175 pages) on 22 Jul. While many successes were noted, there was concern that the Council's income generating activities created conflicts with its cultural diplomacy work. The reviewers also noted that current commercial approaches put the Council in competition with other UK providers (see pp.102-106, 113-117). It was recommended that commercial activities be compartmentalised, to reduce the potential for conflicts, and that the Council demonstrate to UK education stakeholders that it was acting fairly and consistently in the broader UK interest. Given the complexity of the suggested shift, the reviewers called for a review of the costs and benefits of the various options in a second stage of the review.

Overall, the reviewers were scathing of the British Council's conflicts of interest, and called for an "intelligent partnership" with the education sector. In response, the British Council has [acknowledged the criticism](#) and said they will cooperate with the proposed second stage of the review.

Regulatory Issues

- **Malaysia...** is [introducing a new identity card for international students](#) for 'security' purposes. It seems to be aimed at reducing overstaying, and is part of a wider scheme affecting foreign workers too.
- **UK Minister** The UK's minister for universities and science David Willetts [resigned as part of a major government reshuffle](#), and was replaced by Greg Clark.
- **East African Community** The five East African Community member countries (Burundi, Kenya, Rwanda, Tanzania, and Uganda) [have crafted a draft credit transfer system and a qualifications model in a step towards harmonising their higher education](#).
- **China** [Corruption enquiries](#) are spreading to major universities.

Quality Assurance

United Kingdom The furore continued over the UK English language testing scandal, which started in Feb 2014 when testing under the auspices of the Education Testing Service's agents was subverted. In June, 57 private institutions and Glyndwr University had their ability to sponsor students suspended. In July, the following things happened.

- A group of overseas students are [challenging Glyndwr University's withdrawal of sponsorship of their UK study visas partway through their studies in the High Court](#).
- The University of Sunderland has [suspended recruitment at its London campus in the wake of the scandal over language testing](#). Their campus and 8 others are being [investigated by authorities](#).

- A Times Higher Education commentary [argued that universities must take responsibility for oversight of international students](#) (many have “arms-length” arrangements).

National Scholarship and Research Schemes

- **US-China** The US has [passed its target to have 100,000 students study in China](#) by the end of 2014.
- **Turkey...** has [allocated a record TL 204m \(US\\$96m\) to government scholarship programmes](#), as part of an effort to increase international students in the country from 54,000 now to 200,000 by 2023. 90,000 applications are in for the coming year, up from 56,000 in 2013.
- **Erasmus** A record [270,000 European students studied abroad through the Erasmus programme](#) in 2012-13. Albania, Bosnia and Herzegovina and Montenegro [signed agreements in June establishing their partial participation in the Erasmus+ programme](#).
- **Horizon2020** The EU will [invest €7.3bn in 7 public-private partnerships \(PPPs\) as part of the Horizon2020 research programme](#), with a further €12.2bn to be invested by industry.
- **EU Centres** The European Union announced [it is investing €4.6m to establish 6 EU centres across Australia \(5\) and New Zealand \(1\)](#).
- **Singapore...** has apparently [relaxed its internship rules to accommodate all Australian students arriving under the New Colombo programme](#). The sticking point was that they usually limit internships to students from universities in the top 200 on at least one of the 3 main world rankings of universities.
- **Burma...** has opened applications for [scholarships to outstanding students to study at both undergraduate and postgraduate level at international universities](#).
- **Brazil** The Australian speculates that if Brazil’s President Dilma Rousseff fails to win re-election, [a new government is likely to cut the Science Without Borders programme](#).
- **US Rebalancing** Debate continues on a [proposed reduction in Fulbright funding](#) by the US government, with extra funding going to scholarships for African and South-East Asian leaders (usually for much shorter periods than for Fulbright awards).

Immigration

United States July was a busy month for US immigration issues.

- President Barack Obama has indicated [he plans to take executive action as House Republicans continue to stall voting on an immigration reform bill passed by the Senate \(White House\)](#). The bill would establish a path to green cards for PhD and Master STEM graduates and raise the cap on highly skilled worker (H-1B) visas.
- The US Student and Exchange Visitor Programme (SEVP) sought comments on draft guidance on [English proficiency](#) and [conditional admission](#) in July. The English language draft required designated school officials to clarify whether a school has an English proficiency standard and, if so, whether a student has met it. If they don’t have a proficiency policy, they will need to explain why.

The admission draft clarified that conditional admission to programmes cannot be the basis for visa issuance – students must meet all admission standards.

- The SEVP launched an [enhanced website for students and schools](#). It also said that it was [doubling the number of its field representatives](#).
- A US Dept of State [software update went wrong](#) on 20 Jul, causing severe database performance issues. Student visas were delayed, leading to [fears that students would miss the start of the new academic year](#) (although most such students would have applied for, and received, their visa well before the glitch). Most of the backlog was cleared by early August.

United Kingdom The All-Party Parliamentary Group on Migration [launched an inquiry into the impact of the closure of the Post-Study Work \(PSW\) route for non-EU graduates](#). The report will presumably call for a reinstatement of the PSW route, as have other recent inquiries by MPs, but the politics remain against them in terms of securing a change. Submissions close 30 Sep.

The following changes were made to immigration policies and procedures.

- Educational institutions that are highly trusted sponsors will lose that status from Nov 2014 [if more than 10% of those they offer places have visas refused](#) (the current limit is 20%). The delayed implementation allows for a three-month grace period for institutions to update their practices. Indian commentator Ravi Lochan Singh felt that it would [lead to even fewer Indian students going to the UK](#), and it might even fall behind New Zealand in the rankings of Indian students' destination countries. The sector expressed concerns that [the new rules could result in unreliable subjective assessments and have a disproportionate impact on smaller institutions](#) (although measures are in place to account for that).
- [Post study work options were limited further](#), after the government found that graduate entrepreneur routes were being misused. Graduates were apparently applying to set up their own business, but were in reality working for someone else.
- Numerous changes were announced to [improve service levels in China](#) (mostly affecting business and tourism visitors).

Snippets

- **NZ** There were [minor amendments](#) to work rights (eligibility slightly increased), aviation students' visas (an extension to more providers) and working holidays (Croatia added)

Trade Issues

- **Japan-Australia** The [Japan-Australia Economic Partnership Agreement was signed](#) when the Japanese PM visited Australia on 8 Jul. The [education parts of the agreement](#) will treat Australian education providers, other than schools, as Japanese providers. It will also allow Japanese students studying at Australian providers access to low-interest loans from Japan. Finally, there will be efforts to improve mutual qualification recognition and boost student mobility in general.

Political Risk

- **Libya** More than 20,000 Libyans studying abroad on government scholarships have [faced overdue stipends and other administrative problems since the civil war](#). The Al-Fanar Media article went on to cite other serious problems with the selection of students and the monitoring of their progress.
- **Namibian Students...** [were left stranded in Russia when the Namibia Student Financial Assistance Fund \(NSFFAF\) failed to pay for their tickets](#) to return home for internships. NSFFAF was apparently in financial crisis after spending N\$4.5m to bring students home from Ukraine in May.
- **Israel** Institutions with study abroad programmes in Israel [started to evacuate students for safety reasons](#) after the conflict erupted between Israel and Gaza. There was also pressure to reduce cooperation with Israeli institutions, as with [this example from Turkey](#).

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