



# CHINA: Education & training industry

## Access Dynamic and Emerging Markets

JLJ

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### INTRODUCTION

The objective of this report is to provide an overview of the Chinese market for the education and training specifically, *language, IT, soft skills training, and children's education*. The focus is on key emerging markets beyond already established cities such as *Shanghai, Beijing, and Guangzhou*.

### EXECUTIVE SUMMARY

**Market overview.** China has one of the largest education systems in the world in terms of number of students, with about 170 million students enrolled in primary and secondary schools at the end of 2006. In the training market, there are over 93,000 registered training companies; however there are thousands more training companies that are not legally registered. In general, the market is highly fragmented and quality of companies and programs varies considerably.

**Key segments.** *Children's education, language, IT, and soft skills training are the largest segments of the training industry.* While the *English language* market is characterized by fierce competition, the *IT training* market is now mainly dominated by a few large foreign-invested players. In the *children's education* segment, the number of training institutes has increased rapidly over the last few years and competition is strong in Tier 1 and key Tier 2 cities. The *soft skills training* market on the other hand, is characterized by thousands of very small companies (often with only 1 or 2 people), only very few of which are well-known throughout China.

**Drivers of growth.** The lack of skilled professionals and management talents in China is a key driver of growth as companies often use training to improve skills of employees as well as a retention tool; individuals also sign up for training programs to improve their own career advancement opportunities. These factors all drive demand for *language, IT, and soft skills training*. The *children's education* sector is driven by an increasing number of wealthy parents eager to spend on extra education and training courses for their children. In the education sector, the number of school places offered in the public education system cannot meet demand, resulting in rapid growth of the private education sector.

**Regulatory environment.** The regulatory environment for the education sector is complex, with marked distinction between "core" and "non-core" education. "Core education" includes basic and higher education; it is heavily regulated by the government and must be non-profit. Foreign companies wanting to offer "core education" must be already qualified educational institutes in their home country. "Non-core education" includes training companies offering training to professionals and corporate clients and it is more open to foreign players and less subject to extensive screening procedures. Enforcement of rules for "core education" providers at the local level also vary, with many institutes – even including well-known ones – operating or having operated in the past without proper licenses.

**Key emerging markets and best prospects.** Five key emerging markets are analyzed in this report: *Shenzhen, Tianjin, Qingdao, Ningbo, and Nanjing*. *Shenzhen* has a fairly well developed training market across all sectors. There is strong demand for *language training* in *Tianjin* and *Qingdao*, which is being partly driven by the Olympics, as both cities are co-hosts of the games. Besides English, Japanese and Korean languages are also popular in *Qingdao* due to the presence of many Japanese and Korean-invested companies. There is good potential for *Oral English* and *English testing* in *Ningbo* and *Nanjing*; the *IT training* markets are also just taking off in both cities.

**Market Access.** Foreign companies looking to set up an education or training company in China can either: 1) partner with Chinese educational institutions, such as university, or 2) establish a commercial enterprise (Joint Venture or Wholly Foreign-Owned). The first option is generally used by education providers, e.g. higher education institutes, and is regulated by the rules on "core-education" services. The latter is generally used by training providers, e.g. *IT* or *soft skills training*.

## INDUSTRY OVERVIEW – EDUCATION & TRAINING

[Return to Main Page](#)

### Education system overview

[Return to Top](#)

**Market overview.** China has one of the largest education systems in the world in terms of number of students. In 2006, about 170 million students were enrolled in primary and secondary school (grade 1 to 9), which constitutes China's formal basic education. China generally has good student-teacher ratios in classes, ranging from 15 – 20 students per teacher. Government spending on education accounted for about 3.2% of GDP in 2006, which is lower than the 4% target set by the central government in 1993.

**Education system.** The Chinese education system can be divided into five categories, as shown in the table below.

Table 2: Education system in China, 2006

Category	Levels	No. of years	No. of schools / institutes	No. of students [million]	Other data (end of 2006)
Pre-school	Kindergarten	2	130,000	22.6	- Many private kindergartens
Compulsory Education	Primary School	6	341,000	108	- Student-teacher ratio: 17.6
	Junior High School	3	60,885	60	- Student-teacher ratio: 17.1
	Senior High School	3	16,153	25	- Student-teacher ratio: 18.1
Senior Secondary	Senior Vocational School	3	14,693	18	- Includes specialist schools, vocational high schools, technical schools, and adult high schools
Higher Education	Junior College	2 – 5	~2300	>25 (of which PhD students ~0.28M; Masters students ~0.89M)	- Over 800 Sino-foreign joint ventures
	Institute of Technology	2 – 4			- Student-teacher ratio: 17.9
	University/College	4			- 98 registered colleges offering MBA programs
	Postgraduate (Masters, PhD, MBA, etc)	2			- More than 30 approved international cooperation programs, with more than 20,000 students annually
Special Education	Special School	~9	1,605	0.5	- For disabled students

Source: JLJ Analysis based on multiple sources including Ministry of Education and US Commercial Service.

**Compulsory and senior secondary education.** China has a 9-year compulsory education system - six years for primary education and three years of middle school. By law, Compulsory Education should be provided for free. However, in many rural areas, parents are charged fees for examination, school construction, water, etc. which have led to increased school dropout rates in rural areas in recent years. To address this issue the Chinese government plans to eliminate all charges before the end of 2010. Senior secondary education is not compulsory, but together with rising incomes, enrollment in senior high schools has also increased - from 14 million in 2001 to 25 million in 2006.

**Higher education.** There has been active foreign participation in the higher education segment, through establishing Joint Ventures with Chinese institutions to co-develop a new institution, offer a foreign degree affiliated to an existing Chinese university, or provide sub-degrees. Currently, the US has the highest number of partnerships followed by *Australia, Canada, Japan, and Singapore*. Other emerging countries with increasing partnerships include *France, Germany and the Netherlands*.

- **MBAs** - Chinese business schools were first licensed to grant MBAs in 1991, starting with 9 universities and approximately 100 students in total. By 2006, there were about 96 state-run colleges and 2 private colleges offering MBAs with annual enrollment of more than 20,000 students; in addition, there are over 30 approved international cooperation programs. However, many international cooperation programs – even well-known ones - offered MBA programs since 1995 although the Ministry of Education (MoE) only approved it in 2002.

**Special Education.** Special Education Institutions are established for training disabled people. Both admission requirements as well as the different academic programs designed to meet the specific needs of handicapped students are regulated by the “Compulsory Education” and the “Special Education” law.

## Education & Training Market Overview

[Return to Top](#)

**Market Overview.** At the end of 2006, there were over 93,200 registered training companies, of which over 50,000 were language institutes. However, there are thousands more companies that offer training courses without being legally registered<sup>1</sup>. Demand is driven by both individuals and companies. Regarding demand from individuals, young Chinese professionals are willing to spend an average of 10% of their salaries on training. At corporate level, training expenditure by Chinese enterprises amounted to over \$6 billion in 2006. However, average spending on training per employee is still very low - about \$38 per year, compared to almost \$1,000 per year in the US – with significant growth potential. There is also strong government attention on the overall industry, with aims to increase the number of education and training programs offered in the country.

**Key sectors.** The four largest sectors in the training industry are *children's education, language, IT, and soft skills training*, which are the focus of this report. The table below provides an overview of these four segments.

Table 3: Overview of key training sectors, 2006

Sector	Estimated market value, 2006, (\$ M)	% Growth over 2005	Number of companies
<b>Children's education</b>	4,100	30%	Between 8,000 – 10, 000 (excluding kindergarten/schools)
<b>Language (English)</b>	2,500	11%	More than 50, 000
<b>IT</b>	630	20%	More than 12, 000
<b>Soft skills</b>	465	20%	More than 15, 000

Source: JLJ analysis based on multiple sources

**Children's education.** China's *children's education*<sup>2</sup> and training market grew at about 30% to reach about \$4 billion in 2006. Courses offered vary from music and art to creative training. By 2010, the market is estimated to exceed \$12 billion. Growth in this sector is a result of the one-child policy and strong competition to get into top schools. Parents also have increasing disposable incomes to spend on their children. There are about 8,000 – 10,000 *children's education / training* schools, and competition is intense in all Tier 1 and key 2 cities. It is expected that in some cities, such as *Shenzhen*, companies may face challenges over the next 10 years due to possible overcapacity for having expanded too quickly. For example, *Orient Babycare*, a large Chinese company, on average set up one center every 15 days in 2005. In 2006 it expanded even faster by setting up on average one center every 6 days.

**Language training**<sup>3</sup>. China's *English language* market was estimated to be worth over \$2.5 billion at the end of 2006, growing at more than 11% annually. It is estimated that the market will reach \$3.9 billion by 2010. Demand for *English training* comes from children, students, as well as young Chinese professionals taking business English courses. There are more than 50,000 language institutes in China, among which about 700-800 are foreign companies that mainly Targets the high-end market. The standard of *English training* varies considerably, ranging from well-regarded companies such as *Wallstreet English* or *English First* to low quality programs such as "*Learn Perfect English in 10 days*". Large chains have already expanded into Tier 2 cities.

**IT training.** The *IT education and training* market has experienced strong growth of about 20% annually in the past few years, reaching about \$630 million in 2006. Demand for *IT training* comes from private companies, government organizations, state-owned enterprises, individual professionals, as well as job seekers. The most important segment was basic *IT training* and *internet application training*, which accounted for over 50 % of the industry profit; other key segments include *software development, database administration, and operating systems*. Although there are more than 12,000 *IT training* companies, the market is fairly consolidated, with the top 5 companies accounting for more than 40% market share. In particular, the top two companies (*Aptech* and *NIT*, both from India) accounted for 25% of the market.

**Soft skills training.** The *soft skills training* market is still at its infancy, worth about \$465 million in 2006. However it is experiencing strong growth of more than 20% annually; demand comes mainly from Multinational Companies (MNCs). Popular training topics include *management skills, leadership, sales management, customer service, and personal effectiveness skills*. There are at least 15,000 companies offering *soft skills*

<sup>1</sup> Enforcement of regulations on these companies vary by city. Some cities are stricter than others, and take active steps to shut down such companies

<sup>2</sup> Defined as between age 0-14

<sup>3</sup> The largest segment in China's language training market is English; it is also the key language offering of American companies. Thus "language training" in this report refers mainly to English training

training, many of which are very small with no more than 2-4 people, or simply “one-person” independent training consultants. Many of these companies are not specialized solely in *soft skills* (as they offer *other training* courses, such as *language courses*), and there are only a handful of companies that have a strong reputation for *soft skills training*. The following table shows the key players in the above mentioned training sectors

Table 4: Key training (and education) companies in China

Company	Year of entry	No. of outlets/offices	Location	Key corporate clients	Notes
<b>10Children’s education</b>					
Honghuanglan	1998	152	National	N/A	- Medium price - Courses: talking & writing, art, music, games, etc
Gymboree	2003	~60	National		- Targets high end markets - Courses: early childhood development, music, baby creative training etc
Dongfangaiyin	1998	150+	National		- Targets low to medium end market - Courses: creative training, parent-infant training, etc.
<b>Language (English)</b>					
EF	1994	62	National	- ANSYS Inc. - L’Oréal China - COM	- Corporate clients, students, children - Plans to have 200 franchised outlets by 2008
Web International English	1998	60	National	- Bayer - IBM Shanghai - Budweiser	- Corporate clients and mature students - Business English and oral English
Beijing Global IELTS School	1997	56	National	- Foton cars - Health Bureau Beijing - MOF	- Targets broad groups, largely English testing. - Collaboration with government and universities - Also offers French, German, Korean & Japanese
New Oriental	1993	150	National	- MOE - PWC	- Targets mainly students, largely English testing - Focus on short term English training - Offer also Japanese, Korean, French & Spanish
<b>IT training</b>					
Aptech	2000	Above 250	National	- National Development Bank - China Telecom	- Collaboration with government and universities - ACCP, network/hardware/software, java etc - Over 130,000 students in China in 2006
NIIT	1997	165	National	- Changsha Software Park	- Collaboration with government and universities - UML, C++, JAVA, ISAS, HTML, Oracle, Linux etc
<b>Soft skills</b>					
IWNC	1994	3	Shanghai, Beijing	- Siemens - Cignis China	- Targets medium to high-end corporate market - Reputed for team and strategy development training - Conduct programs in various languages
Professional Way	1998	3	Shanghai, Suzhou, Guangzhou	- Siemens - IDEX - PepsiCo Foods - Electrolux	- Targets broad groups, including individuals - Relatively high price - Leadership development, corporate culture development, senior team development etc.
Clark Morgan	2001	10	Yangtze/Pearl River Delta, Beijing	- Maersk - BAT - NVR	- MNCs & large Chinese companies - Relatively high prices - Cross culture, communication, team building, etc.

Source: JLJ analysis based on multiple sources including company websites, phone interviews, and news articles

## Regulatory Environment

[Return to Top](#)

Within the education and training sector, the Chinese government distinguishes between “Core education services” and “Non-core education services”. “Core education” includes basic and higher education, such as high school, university, and MBA programs, where degrees are offered. “Non-core education services” includes most training that is offered to companies and adults, where degrees are not offered (but certifications may be offered.)

“Core education” is heavily regulated by the government. There is a long approval process to establish companies to offer core education, and training materials and teaching methods are closely monitored by the government and must comply with Chinese standards. “Core education” providers must be non-profit companies, and foreign companies must already be qualified educational institutes in their home country. However, enforcement of this regulation at the local level varies, and some cities are stricter than others in enforcing the rule. It must be noted that training for children is classified as “core education” when there is printing of educational material and textbooks; thus a special license is needed to offer courses in this area.

“**Non-core education**” is much less protected. Although companies have to register with the local government, training companies are not subject to extensive screening procedures - there are national guidelines to follow, but no specific laws for training companies.

American companies considering to enter the China market have several options, which can be found in the *Market Access* section of this report.

## Key market drivers

[Return to Top](#)

**Shortage of qualified personnel.** There is a shortage of skilled/qualified managers in China, and training is often used by companies as a way to fill the skill gap. In the past few years, the government has placed significant emphasis on developing management education in China. *Corporate training* courses are also increasingly used as retention tool by large MNCs.

**Career advancement.** Graduates and young professionals are willing to spend on training, as certifications are regarded as being a key factor for career advancement. These range from *Business English* courses, to *management* or *IT training*.

**Limited capacity available at public institutions.** There are a limited number of places available in the public education system, especially in the higher education sector, thus driving demand for private education. Supply of university places are regulated by the National Quota system, where each university has a quota on the number of students it can accept from each province<sup>4</sup>. In 2005, approximately 5 million students did not receive a university placement under this quota system, and many of these students attend private institutions instead. On the other hand, many students attend private / foreign institutions by choice, due to a combination of factors including reputation, smaller class sizes, international teaching methods, etc.

**One-child policy, great attention to children from the family.** One of the results of the one-child policy is that children have become the center of attention of both parents and grandparents, who are willing and able to spend significant resources on the child. Over 5 % of parents in China’s urban areas consider their children’s education and training as a top spending priority.

## Top Regional Markets

[Return to Top](#)

**Key regional markets.** Fourteen emerging markets have been analyzed through a set of criteria<sup>5</sup> and five key cities were selected for further analysis in this report - *Shenzhen, Tianjin, Qingdao, Nanjing and Ningbo* – as shown in the map below.



Source: JLJ Analysis

<sup>4</sup> The quota is determined by the university, but the admission of students is by merit. For example, if there are 20 places available for a particular province, the top 20 applicants will be admitted into the university

<sup>5</sup> The criteria used included population, GDP, GDP growth, number of language schools, number of international schools, disposable income, number of foreign tourists, Foreign Direct Investment level, and the proportion of GDP derived from tertiary industry. The final selection was made taking into account both hard data as well as soft data (from field interviews).

The following tables provide an overview of the key indicators of the top regional markets.

Table 5: Overview of key regional markets

City	Population (million)	GDP (\$ billion)	GDP/ per capita (\$)	Estimated market value, 2006 (\$ M)				Notes
				Children's education	Language	IT training	Soft skills	
<b>Shenzhen</b>	8.4	72.9	8,706	69	40	19	27	<ul style="list-style-type: none"> <li>- Government plans to spend over RMB 10 billion on education, training, R &amp; D over next 5 years</li> <li>- 3 Universities, 26 vocational schools, about 12,000 training institutes</li> </ul>
<b>Tianjin</b>	10.6	55.6	5,251	73	33	12	21	<ul style="list-style-type: none"> <li>- Over 35 universities &amp; colleges, 150 national &amp; local technical centers</li> <li>- Government has stipulated education/training as key priority over next 5 years</li> </ul>
<b>Qingdao</b>	7.5	41.1	5,488	27	24	6	9	<ul style="list-style-type: none"> <li>- Over 25 universities, 80 vocational schools</li> <li>- Large Korean / Japanese population, driving demand for Korean &amp; Japanese language</li> </ul>
<b>Nanjing</b>	7.0	35.6	5,049	41	33	17	19	<ul style="list-style-type: none"> <li>- 41 universities &amp; colleges, 13, 900 foreign companies, 3000 training institutions</li> </ul>
<b>Ningbo</b>	5.6	36.7	6,575	13	13	9	7	<ul style="list-style-type: none"> <li>- 12 universities &amp; colleges, over 6000 foreign companies, 1500-1800 training companies</li> </ul>

Source: JLJ analysis based on multiple sources including news articles, publications and interviews

**Shenzhen.** *Shenzhen* is China's first Special Economic Zone and ranks among the wealthiest cities in China. *Shenzhen* has the most developed training market among all five cities analyzed in this report. The *language training* market has experienced consolidation in *Shenzhen* in the last few years, and the same is expected for *children's education* over the next few years.

**Tianjin.** Located on the *Bohai Bay*, *Tianjin* is one of four autonomous municipalities in China. There is strong demand for *language training* and *children's education*, partly driven by the Olympics, as the city is a co-host. *Tianjin* is also an important software development location, thus the *IT training* market is relatively well developed.

**Qingdao.** *Qingdao* is one of China's top commercial ports and has particularly strong trade links with *Korea* and *Japan*. Thus there is demand for Korean and Japanese courses, in addition to English. Like *Tianjin*, *Qingdao* is also a co-host of the Olympics, which is driving demand for *language training* in general.

**Nanjing.** *Nanjing* is the capital of Jiangsu and ranks among the fastest growing cities in China. *Nanjing* has a strong education history, housing several renowned universities. Although the training market still lags behind other relatively more developed cities like *Shenzhen* and *Tianjin*, there is good growth potential in all sectors.

**Ningbo.** *Ningbo* is China's fourth largest trading port and is located only 160 km south of *Shanghai*. The education and training market is the least developed among all 5 cities analyzed in this report. Many large companies have yet to set up branches in *Ningbo*, or have only done so in the past 1 – 2 years. There are good opportunities especially for *Oral English*, *English testing*, and *IT training*.

## MARKET OVERVIEW: SHENZHEN

[Return to Main Page](#)

*Shenzhen*, the first city in China to be designated as a Special Economic Zone, is located in the *Pearl River Delta* in *Guangdong* province. The city's superior geographical location is one of the reasons for its rapid economic development in the last decade. Besides being near the *Pearl River*, which facilitates domestic connectivity, *Shenzhen* is also only a short distance away from *Hong Kong*. With a GDP per capita of about \$8,904, *Shenzhen* is one of the wealthiest cities in China. The city is also a popular location for foreign investors, attracting \$3.2 billion worth of FDI in 2006 (about 4.6% of China total).

### Summary: Education & Training market in Shenzhen

*Shenzhen's* education & training market is relatively well developed, and has experienced growth of more than 20% annually across all sectors. **The English training market in Shenzhen has experienced consolidation over the past two years, and the same is expected for the children's training market over the next few years.** *Shenzhen* is China's largest software manufacturing base, driving demand for *IT training* sector. There are no clear market leaders in the *soft skills* market, which is dominated by many small companies.

### Children's education

[Return to Top](#)

**Market Overview.** There are a large number of wealthy parents in *Shenzhen*, who are eager and willing to spend on their *children's training*, enrolling their children not only for English lessons, but also piano and computer lessons from a very early age. Parents are also willing to spend significant amounts of money to get their kids into a good kindergarten or pre-school. By the end of 2006, the market value for children's education and training was estimated at \$69 million, growing at 35% over 2005. However, given the low birth rates, competition among *children's education* providers is expected to intensify over the next 10 years.

**Key players.** There are about 480 companies providing training for children. The largest player is *Shenzhen South Baby Early Education*, with 20 outlets. The following table provides an overview of the key players in *Shenzhen*.

Table 9: Key Children training providers in Shenzhen

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<i>Gymboree</i>	US	2005	2	- Targets high end market (about RMB 200/class) - Good reputation - Early childhood development, music, art, etc.
<i>Shenzhen QSI International School</i>	US	2001	1	- Targets foreign children (2-18 years) in Shenzhen - Teachers are all foreigners; small class sizes - High price (but established as a not-for-profit school)
<b>Domestic</b>				
<i>Dongfang Aiyin</i>	China	2001	5	- Targets comparatively high end market - Medium price (about RMB 50-70/class) - Music, art, creative training etc
<i>Shenzhen South Baby Early education</i>		2002	20	- Targets broad families, focus on children's personality - Medium price (about RMB 70-80/class) - Courses: PAP teaching, baby intelligence, etc.
<i>Shenzhen Urban Baby first childhood education</i>		2000	12	- Targets broad families - Low to medium price - Courses: baby development, intelligence training, music & sports, etc.

Note: Year established, number of outlets, and notes all refer to the *Shenzhen* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best Prospects.** Despite strong competition, there are opportunities for US companies providing study materials and creative courses ranging from English classes to music and art.

### Language training

[Return to Top](#)

**Market overview.** The *English language* market in *Shenzhen* has experienced rapid growth in recent years with market value of about \$40 million in 2006. There are more than 130 registered training schools and over

1,000 more that are not legally registered. About 200,000 students per year attend language training classes in *Shenzhen*. The market has experienced consolidation in the last two years, with the exit of many lower quality language schools.

**Key players.** In *Shenzhen*, foreign-invested *language training* providers with strong brand names are generally preferred over small Chinese institutions, as these companies generally have well-qualified teachers and use a variety of teaching materials and methods. There are also a handful of domestic companies which are well established in *Shenzhen*, for example *Com-Com*, which has many corporate clients. The following table shows the key players in the *Shenzhen* market.

Table 6: Key language training providers in Shenzhen

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<i>Wallstreet English</i>	US/ Europe	2005	4	- Targets high-end market, corporate training - Offers one-to-one classes - Customers mainly aged 22-40
<i>EF</i>	Sweden	2000	2	- Targets children, students, corporate clients - Largely business oral/ kids English, e-learning, - Medium to high prices
<i>World Institute Link</i>	England	2002	2	- Largely business English& IELTS - Small class teaching, high prices
<b>Domestic</b>				
<i>Shenzhen New Oriental</i>	China	2003	3	- Targets broad group, medium prices - Traditional teaching methods, focus on rote learning - Focus on English testing, although some examinations training for other subjects also offered
<i>Com-com English center</i>		2002	3	- Targets high-end market, corporate clients, children - Customers mainly aged 20-40 - Some collaboration with companies including IBM, Maersk
<i>Global IELTS</i>		2001	2	- Focus on English testing (IELTS) - Medium prices - Training period usually less than 25 days

Note: Year established, number of outlets, and notes all refer to the *Shenzhen* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** There is demand for oral English courses as well as short-term intensive courses, in class rooms as well as in the form of *e-learning*. Key customer segments for such courses are young professionals and students. However, it must be noted that most of the well-known brands have already entered the *Shenzhen* market, thus it may be challenging for new entrants (without a track record in China) to compete.

## IT training

[Return to Top](#)

**Market Overview.** At the end of 2006, the *IT training* market in *Shenzhen* amounted to over \$19 million, growing at 15 % over 2005. *Shenzhen* is the largest software manufacturing base in China, accounting for over 50% of all domestic software development. In line with this, software development training accounted for about 50% of the total *IT training* revenue, followed by basic IT training and internet application training. Currently, there are about 100 registered *IT training* providers (and over 700 training providers that are not registered). Many local *IT training* companies are increasingly customizing their training programs to the specific needs of companies and individual professionals.

**Key players.** *Shenzhen* has attracted many foreign *IT training* companies. Key foreign players such as *Aptech*, *CISCO*, and *NIIT* are well established in *Shenzhen* market and offer training courses ranging from basic *IT training* to *specialized software development training*. Their main customers are young professionals and corporate clients. The following table gives an overview of the key players in *Shenzhen*.

Table 7: Key IT training providers in Shenzhen

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<i>Aptech</i>	India	2001	16	- Targets students, professionals & companies - High price/ very good reputation - Customer: Shenzhen technology college, Renda group, Bank of China



<b>CISCO</b>	US	2000	About 10	- High price - Popular among young professionals
<b>NIIT</b>	India	2001	7	- Targets broad groups - High price/very good reputation - Customer: Huawei, IBM, Shenzhen Telecom etc
<b>Domestic</b>				
<b>Shenzhen Zhongnan Education Training</b>	China	2003	3	- Targets largely students & young professionals - Medium price - Collaborates with universities in Shenzhen
<b>Shenzhen Electrical Industry Talented Person Training Center</b>		1980	1	- Targets broad group - Medium price - Customer: local government, Ministry of Education etc

Note: Year established, number of outlets, and notes all refer to the *Shenzhen* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** There are four key industries that companies wishing to offer *IT training* programs may target in *Shenzhen* - logistics, electronics, retail, and finance. Although the *IT training* market is already very competitive, there may still be opportunities for training companies as the software sector is expected to continue growing in *Shenzhen*.

## Soft skills training

[Return to Top](#)

**Market overview.** In 2006, the *soft skills training* market was worth about \$27 million, a growth of more than 20% over 2005. There are about 2,500 training companies offering *soft skills courses*; the majority of these are very small companies employing not more than 1 to 2 people. Some training companies also provide other courses in addition to soft skills training.

**Key players.** *Shenzhen's soft skills* market is very competitive with many small Chinese companies; key customers of *soft skills training* providers in *Shenzhen* include MNCs, and large Chinese companies. Trainers may also sometimes be hired from *Hong Kong* as they are perceived to be generally of better quality.

Table 8: Key soft skills training providers in Shenzhen

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<b>Clark Morgan</b>	US/ Canada / China (office founded in <i>Shanghai</i> )	2004	1	- Courses include cross cultural, communication, team building, developing leaders, etc. - Headquartered in Shanghai - Customers include: Maersk, Ernst & Young, BAT, etc.
<b>Domestic</b>				
<b>Dongfang Dacheng management</b>	China	2005	1	- Targets large Chinese companies/ tailored courses - Good reputation for human resource management training - Prices vary according to client - Customer: Hunan cemented carbide group, Zhuzhou Commerce bank, Kingdee etc
<b>Chengwei management</b>		1995	1	- Targets broad groups, medium price - Largely Chinese customer, i.e. Sichuan Juda group, Jiangxi Changyun group, COFCO
<b>Yancheng consulting</b>		1992	1	- Targets mid-high end market - Customer: Shenzhen commerce bank, HK telecom, TCL group, Development bank, etc
<b>Leadership INC</b>	China	N/A	1	- Courses include strategic plan management, team building, leadership development, personality testing, etc. - High price

Note: Year established, number of outlets, and notes all refer to the *Shenzhen* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** *Soft skills training* are well-received in *Shenzhen*, and competition is already growing. Product differentiation is important for new entrants. Surveys of potential corporate customers in *Shenzhen* showed that it is important to offer programs tailored to a company's specific needs as well as tools to measure results to ensure that the desired outcomes are implemented. For example, some companies have created assessment tools to quantify training results, and also offer post-training follow-up.

## MARKET OVERVIEW: TIANJIN

[Return to Main Page](#)

*Tianjin* is one of the four autonomous municipalities in China, together with *Beijing*, *Shanghai* and *Chongqing*. It belongs to the *Bohai Bay Economic Zone*, one of the three largest economic zones in China. With a per capita GDP of \$5,251 (2006), *Tianjin* is one of the wealthiest among second-tier cities in China. In addition, *Tianjin* has developed an advanced transportation infrastructure and acts as a transport hub for North China. This makes *Tianjin* an ideal gateway for US software exporters to serve the North China market. In the 11<sup>th</sup> five-year plan, the government has committed to strengthen the region's economic position, giving priority to develop the *Binhai New Area*.

### Summary: Education and Training market in Tianjin

*Tianjin* is a renowned education center and is home to more than 35 universities and colleges. *Tianjin* also has more than 150 national and local technical centers, many of which train professionals in the manufacturing industry. **The *Tianjin* municipal government considers education & training as one of the key sectors to develop in the next few years.** Although there are a large number of training companies across all sectors, standards of teaching vary considerably, with many small and unqualified institutes. There is strong demand for *language training* and *children's education*.

### Children's education

[Return to Top](#)

**Market Overview.** At the end of 2006, the *children's training and education* market generated an impressive revenue of about \$73 million, representing growth of 24% over 2005. A survey of more than 300 parents in *Tianjin* showed that more than half of the parents consider their children's education and training as unsatisfactory. As a result, many parents have invested heavily in extra lessons offered by private teachers, schools or training centers. As a co-host city of the Olympic Games in 2008, the local government has also launched the "*Beijing 2008*" project, which sponsors children's education in activities such as sports, creative learning, language etc.

**Key players.** There are over 400 children's education providers in *Tianjin*. In general parents prefer foreign brands or well known Chinese brands with a national presence. The following table provides an overview of the key players in *Tianjin*.

Table 13: Key children training providers in Tianjin

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<b>Gymboree</b>	US	2006	1	- Targets high-end market - Known for bilingual teaching methods and its teaching experts
<b>Domestic</b>				
<b>Cathay future</b>	China	2001	13	- Largest private chain in Tianjin, medium price - Strong cooperation with the government - Baby development, situational games, training for parents
<b>New Oriental</b>		2002	6 open for children	- Targets children (but also students, corporate clients) - Good reputation - Oral English, development, games, pronunciation,
<b>Dongfang aiyin</b>		2001	3	- Targets broad families; medium price - Synthesis feeling training, classical music, creative baby training,
<b>Honghuanglan</b>		2006	1	- Baby development, situational games, training for parents - Medium price; good reputation - Targets children aged 0-6 years old

Note: Year established, number of outlets, and notes all refer to the Tianjin market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** There is demand for art lessons, *English language training*, music and sport lessons, partly driven by strong government encouragement.

### Language training

[Return to Top](#)

**Market overview.** As *Tianjin* is co-hosting the Olympics, the government has been encouraging residents to learn foreign languages, in particular English. As a result, *Tianjin* has experienced rapid growth in the *language*

*training* market, growing at about 30% annually, to reach about \$33 million in 2006. In the summer of 2006 alone, more than 200,000 people, ranging from students to professionals, participated in *English language training*.

**Key players.** Currently there are more than 450 *language training* institutions in *Tianjin*, many of which are not legally registered; companies which are not legally registered are often poorly managed and staffed with unqualified teachers. In *Tianjin*, there is also increasing demand for other foreign languages such as French. At the end of 2006, there were about 10 registered French training centers. The following table provides an overview of the key players in *Tianjin*.

Table 10: Key language training provider in *Tianjin*

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<i>EF</i>	Sweden	2001	3	- Targets corporate clients, students, children - Customer: Sunlife, ABB, Carrefour, Danfoss, Schneider, etc. - "Designated English training school" by Tianjin government
<i>Canadian Tianjin Deltar Institute</i>	Canada	2002	1	- Targets broad groups - Short English courses of 3-4 weeks - Writing, business topics, vocabulary & oral English
<i>Enlischool</i>	Canada (first center founded in China)	2004	1	- Targets broad groups - Employs over 30 native speaking teachers - Good reputation
<b>Domestic</b>				
<i>Global IELTS</i>	China	2001	3	- Targets students & corporate clients - Strong co-operation with government - IELTS, TOEFEL, GRE, business English, Japanese& Korean - Customer: Tianjin Disabled Peoples Union, Ministry of Health
<i>New Bridge English</i>		1999	2	- Targets students, children - Some foreign teachers
<i>New Hope education</i>		2002	2	- Targets students, corporate clients (mainly Japanese and Korean) - Oral English, oral Japanese & Korean
<i>Web international English school</i>		2006	1	- Targets corporate clients, high end market - English E- learning, business English - Customer: IBM, Bayer, Quanguan computer
<i>New Oriental</i>		2002	4	- Targets students & corporate clients - IELTS, TOEFEL, GRE, business English

Note: Year established, number of outlets, and notes all refer to the *Tianjin* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** The Olympic Games in 2008 is expected to substantially increase the demand for *English language training*, not only in the run-up to the Games but also in the long run. Currently, about 60% of the people joining English training classes in *Tianjin* aim to improve communication skills; it is expected that Oral English will remain the most popular *English training* course among young professionals in the city.

## IT training

[Return to Top](#)

**Market overview.** Over the past few years, *Tianjin* has become an important software development location and the local *IT training* market has also experienced significant growth. The market value of *IT training* was more than \$12 million in 2006, growing at about 24% over 2005. The municipal government has put in significant effort to promote *IT training* for people of all levels. At the end of 2005, more than 1.5 million *Tianjin* residents received *IT training*, among which about 1 million people have obtained IT certificates for a variety of courses.

**Key players.** Currently there are more than 120 registered *IT training* providers and over 20 universities offering *IT training* programs. However, a small number of key players dominate the market. *Aptech* and *NIIT* have a combined market share of over 40% in *Tianjin*. It is estimated that more than 75% of the people signing up for *IT training* are students, graduates, and young professionals looking for a job in MNCs. The following table provides an overview of the key players in *Tianjin*.

Table 11: Key IT training providers in Tianjin

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<b>Aptech</b>	India	2001	6	- Targets graduate students, software engineers in companies - Java, ISAS, HTML, Oracle, software engineering, Linux etc
<b>NIIT</b>	India	2001	5	- High prices - Java, ISAS, HTML, Oracle, software engineering, Linux etc
<b>Domestic</b>				
<b>Zhongshang training school</b>	China	1997	4	- Targets broad group, many unemployed people - Low end market - Low level IT training, i.e. basic IT training - Offer other services, e.g. computer repair
<b>Great Wall Computer</b>		2005	2	- Targets students, young professionals changing jobs - Focus on software engineering training, 3dmx training - Corporate with some computer or software companies
<b>Tianjin Tianliweisu training</b>		1998	2	- Largely students and young professionals changing jobs - WEAS, XML, Java, NET, JSP, ASP
<b>Wisdom training palace</b>		2001	1	- Targets students & corporate clients, good reputation in Tianjin - CCNA, CCNP, JAVA SCJP advanced, Oracle - Customer: NEC, Tianjin Tiens group, Tianjin Epson limited, Tianjin Honeywell

Note: Year established, number of outlets, and notes all refer to the *Tianjin* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best Prospects.** Many graduates or young professionals regard IT certification as being one of the key factors for getting employed by MNCs. Thus, there may be potential opportunities for foreign training providers offering programs with quality certificates that are recognized by both large international as well as local companies.

## Soft skills training

[Return to Top](#)

**Market overview.** *Tianjin's soft skills training* market was estimated at over \$21 million at the end of 2006, with 25% growth over 2005. Many of the key *soft skills training* providers in *Tianjin* work in cooperation with local government officials and professors. Government officials who have expertise on enterprise efficiency are often invited as guest speakers by *soft skills training* providers.

**Key players.** There are about 600 companies providing *soft skills training* in *Tianjin*. Currently, demand for *soft skills training* arises both from medium to large private Chinese companies as well multinational companies. The following table provides an overview of the key players in *Tianjin*

Table 12: Key soft skills training providers in Tianjin

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<b>Tianjin Motorola University</b>	US	1993	1	- Courses include leadership and senior management training, sales training, social skills training, supply chain training, etc. - Mainly focus on training Motorola staff, although it also trains external parties
<b>Cegos</b>	Europe	1997 (in China)	1	- No office in Tianjin, but offers classes there (Trainers are based in Beijing and Shanghai) - Courses in Tianjin include: management, HR, etc.
<b>Domestic</b>				
<b>Better choice management consulting</b>	China	1999	1	- Courses: HR, social skills, Management training, etc. - Targets foreign & large Chinese companies; Good reputation
<b>Tianjin Guanghua enterprise management</b>		2001	1	- Courses: variety of management training courses - Customer: Tianjin electric power, New World real estate, Tianjin China telecom, Tianjin Pudong development bank
<b>Sanshi business management (3c management consultants)</b>		2004	1	- Team building, leadership, enterprise culture - Customer: China Petrol, RT-mart, Tianjin finance & tax bureau, LG chemicals

Note: Year established, number of outlets, and notes all refer to the *Tianjin* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** There are opportunities for American companies to offer specific training programs to MNCs, as many of *Tianjin's soft skills training* providers are very small and not specialized. Inviting professors from *Tianjin* or *Nankai University* to lecture on particular topics is a popular way to gain brand recognition.

## MARKET OVERVIEW: QINGDAO

[Return to Main Page](#)

*Qingdao* is one of China's top commercial ports, a leading marine science center and headquarters of the northern command of Chinese navy. The city had become a favorite destination for foreign investment in the past few years, achieving one of the highest FDI levels (\$3.65 billion in 2006) in China. Its advantages include good infrastructure, an accommodating and supportive local government and its prime position in the center of the Northeast Asia market, close to *Korea* and *Japan*.

### Summary: Education and Training market in Qingdao

Like *Tianjin*, *Qingdao* is co-host of the Olympic games in 2008, which is driving demand for *language training*. Besides English, there is also strong demand for Korean and Japanese *language training*, as many workers are employed by Korean or Japanese-invested companies, or conduct trading business with the two countries. *Qingdao* is also home to some of China's most well-known brands, including *Haier* and *Tsingtao Beer*, both of which are key customers for training companies. **In general, the *Qingdao* training market is still fragmented and dominated by small companies.**

### Children's education

[Return to Top](#)

**Market overview.** At the end of 2006, there were about 1.2 million children between the age of 0 and 14 in *Qingdao*. *Qingdao* has a relatively developed children's education market, with many large training providers in the city. The *children's training* market was worth about \$27 million in 2006.

**Key players.** Parents in *Qingdao* are very brand oriented and usually choose well-established institutes such as *Qingdao QQ Baby* or *Wanyingzhuizhong*, which are known for employing famous children experts. The following table provides an overview of the key players in *Qingdao*.

Table 17: Key children's training providers in *Qingdao*

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<i>Small Harvard bilingual kindergartens /school</i>	Taiwan	1999	3	<ul style="list-style-type: none"> <li>- English, Child development training, parent training</li> <li>- Prestigious educational brand</li> <li>- CCTV Children's English contest</li> <li>- Strong co operation with government</li> </ul>
<b>Domestic</b>				
<i>Qingdao QQ baby</i>	China	2001	15	<ul style="list-style-type: none"> <li>- Baby development, early reading, teaching music, intelligence training</li> <li>- Targets infants and young children 0-6 years old</li> <li>- Franchise model, 15 institutions in Shandong Province</li> </ul>
<i>Qingdao Wanyingzhuizhong</i>		2001	10	<ul style="list-style-type: none"> <li>- Baby development, early reading, music, games, brain development, parent training</li> </ul>
<i>Qingdao Dongfangaiying</i>		2004	2	<ul style="list-style-type: none"> <li>- Creativity training, classical music, imaginal training, parent-infant communications, speaking &amp; writing</li> <li>- Targets infants 0-3 years old</li> </ul>
<i>Qingdao Honghuanglan paternity Kindergartens</i>		1997	4	<ul style="list-style-type: none"> <li>- Arts, music, games, reading, speaking etc</li> <li>- Targets infants 0-3 years old</li> <li>- Franchise model</li> </ul>
<i>Qingdao DF-Olympic Children Education</i>		1989	1	<ul style="list-style-type: none"> <li>- Focus on training for Children's Mathematical Olympiad</li> <li>- Targets children between 6-13 years old</li> </ul>

Note: Year established, number of outlets, and notes all refer to the *Qingdao* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** In general, parents are wary of children's education schools and do not trust institutions that they have not heard of before. There are opportunities for American companies to offer children's classes in English using native speakers, as well as in creative training.

### Language training

[Return to Top](#)

**Market overview.** *Qingdao's language* market experienced outstanding growth rate of about 30% annually to reach about \$24 million in 2006. *Qingdao's language* market is not only driven by the demand for English but

also many other languages, especially *Korean* and *Japanese*, due to the geographical proximity to the two countries.

**Key players.** With over 210 registered *language* institutions, *Qingdao's* foreign *language* market is still developing. The quality of teaching, school management and classroom environment vary considerably between different institutes, and many are of low standards. The following table shows the key training centers in *Qingdao*.

Table 14: Key foreign language providers in Qingdao

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<i>EF</i>	Sweden	2001	1	<ul style="list-style-type: none"> <li>- Targets adults &amp; children</li> <li>- IELTS, Oral English, Kids/ Business English,</li> <li>- Good reputation</li> <li>- More than 5000 people have attended courses</li> </ul>
<i>World Exchange college of language</i>	Canada	2006	1	<ul style="list-style-type: none"> <li>- English testing, Oral, Written English</li> <li>- Medium prices, targets mainly students (for English testing)</li> <li>- American/Canadian teaching methods</li> </ul>
<b>Domestic</b>				
<i>Great Wall center</i>	China	2003	1	<ul style="list-style-type: none"> <li>- Various languages: Korean in particular, English Japanese, German, Spanish</li> <li>- Focus on oral/conversational skills</li> <li>- Customers are mainly professionals; high prices</li> </ul>
<i>Flander foreign language school</i>		2000	1	<ul style="list-style-type: none"> <li>- English, Japanese, German, Spanish, French, Korean</li> <li>- Customers are mainly university students; medium prices</li> <li>- Focus on oral / conversational skills</li> </ul>
<i>Qingdao Success Foreign language</i>		1993	3	<ul style="list-style-type: none"> <li>- English, Japanese, German, Spanish, Italian, Portuguese, Korean, Russian</li> <li>- Focus on language testing, especially Japanese</li> <li>- Customers mainly aged 20-35</li> </ul>

Note: Year established, number of outlets, and notes all refer to the *Qingdao* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** *Qingdao* offers good potential opportunities for offering *language* courses to young professionals and children, and also to the public sector. Like *Tianjin*, the *Qingdao* government places strong emphasis on the importance of improving *language* skills, and conversational English courses are expected to be the most popular.

## IT training

[Return to Top](#)

**Market overview.** As in many other key cities in China, the local government in *Qingdao* is eager to develop the IT industry. Over the past few years, it has supported local *IT training* providers in order to promote the development of the *IT training* market. At the end of 2006, the *IT training* market amounted to \$6 million, a 20% growth over 2005. *IT training* has also been heavily emphasized in government departments and state-owned companies, such as *Qingdao Telecom*, *Qingdao Customs*, or *Bank of China*, who have all been customers of key *IT training* providers.

**Key players.** At the end of 2006, there were slightly less than 100 registered *IT training* institutions. Demand was mainly driven by large companies such as *Haier*, *Qingdao Beer*, or *Daewoo*. The following table provides an overview of the key players in *Qingdao*.

Table 15: Key IT training providers in Qingdao

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<i>Aptech</i>	India	2002	1	<ul style="list-style-type: none"> <li>- Targets students &amp; corporate clients</li> <li>- Enterprise certification examinations</li> <li>- Courses: Java, ACCP, hardware/software engineering, web design</li> <li>- Customers: IBM, Kingdee, Inspur, Games Warehouse</li> <li>- Cooperates with local university</li> </ul>
<i>NIIT</i>	India	2007	1	<ul style="list-style-type: none"> <li>- Targets students &amp; corporate clients</li> <li>- Courses: UML, C++, Java, ISAS, HTML, Oracle</li> </ul>

				- Customer: Qingdao university
<b>Domestic</b>				
<b>Sanhao Information Management</b>	China	1994	3	- Targets students, government, corporate clients - Courses: elementary computer training, CAD, CNC programming, UG - Customer: Laoshang district gov., Tsingtao beer etc
<b>Software talented person training</b>		2006	3	- Targets students & government - Courses: CMM, Network/software engineering, web design, network hardware etc - Customer: Qingdao local government, finance, and tax bureau
<b>Great Wall computer college</b>		1997	1	- Targets students - Certification examination training - Courses: CAD, web design, Sun Java etc.

Note: Year established, number of outlets, and notes all refer to the *Qingdao* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** Currently, the *Qingdao* IT market offers opportunities for American companies providing training programs with technical certifications, which are popular with graduates and young professionals. There will also be demand for *training programs* in *software engineering*, as one of the government's goals is to transform *Qingdao* into a center for the software industry.

## Soft skills training

[Return to Top](#)

**Market overview.** *Qingdao's* *soft skills training* market was estimated at over \$9 million at the end of 2006. The city is home to several successful Chinese brands, such as *Haier* and *Tsingtao Beer*. Many *soft skills training* companies are cooperating with universities and government departments in order to get access to these "case study" companies, which are used as part of the training material.

**Key players.** Overall, there are about 200 *soft skills training* providers in *Qingdao*. Medium-sized Chinese companies in *Qingdao* are increasingly investing in training programs for their staff. At many times, large companies in *Qingdao* hire foreign-invested *soft skills training* companies not necessarily based in *Qingdao* (e.g. a provider from *Shanghai* may be hired to train staff in *Qingdao*). This is because many companies do not trust the small local training providers. The following table provides an overview of the key players in *Qingdao*.

Table 16: Key soft skills training providers in Qingdao

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<b>Clark Morgan</b>	US/ Canada / China (office founded in <i>Shanghai</i> )	2002	1	- Courses include cross cultural, communication, team building, developing leaders, etc. - Headquartered in <i>Shanghai</i>
<b>Domestic</b>				
<b>Qingdao elite business school</b>	China	2004	1	- Chinese management, enterprise spirit, leader ability training, performance training etc - Customers: Haier, Tsingtao Beer, Nonglai Bank
<b>Diwoke Management consulting</b>		1999	1	- Brand strategy management, cost improvement management, etc - Partners with Qingdao university - Medium price
<b>Qingdao boya management consulting</b>		2001	1	- Leadership training, organizational change, Human resource management , etc - Customers: Haier, Luyang Group, Panasonic, Baidu... - High price

Note: Year established, number of outlets, and notes all refer to the *Qingdao* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** The market for *soft skills training*, such as communications and managerial capabilities, is considerable and opportunities for American players not only arise from international companies but also large Chinese companies such as *Haier*.

## MARKET OVERVIEW: NANJING

[Return to Main Page](#)

*Nanjing*, the capital of *Jiangsu* province, ranks among China's most rapidly growing cities. The GDP of *Jiangsu* province, at \$276 billion, is ranked third in China overall after *Guangdong* and *Shandong*. *Nanjing* was also ranked the 7<sup>th</sup> most competitive city in China. *Nanjing* has a GDP of \$35.6 billion and a GDP per capita of about \$5,049 (2006), and is also an attractive destination for foreign investment. Over 1000 American companies are doing business in *Nanjing* and the *US* ranked *Nanjing* as its second largest trading partner after *South Korea*. *Nanjing* is an important manufacturing base in China, with key industries being electronics, petrochemicals, automotive and steel.

### Summary: Education and Training market in Nanjing

Like *Tianjin*, *Nanjing* is also a city with a long history for higher education, housing several renowned universities. However, the training market in *Nanjing* is still in the developing stages, with relatively fewer foreign-invested training companies compared to *Shenzhen* or *Tianjin*. In general, the market is fragmented, with a large number of players and varying training standards. In the *language* market, there is demand for *language testing* and *Oral English*. The *IT training* market is still focused on more basic *IT training*, with relative training for special certifications e.g. CISCO. There is growth potential in both the *soft skills training* and *children's education* markets.

### Children's education

[Return to Top](#)

**Market overview.** *Nanjing's* children's education and training market was estimated at \$41 million at the end of 2006, growing at nearly 30% that year. The number of children under the age of 14 was estimated at over 890,000, representing over 12% of *Nanjing's* total population. There is thus significant potential opportunity for children's education in *Nanjing*. The *Nanjing* government, like *Qingdao*, also strictly regulates the industry, and enforces the central government regulation requiring private institutions to obtain special licenses in order to provide *education & training* to children.

**Key players.** At the end of 2006, there were about 260 *children training* institutes in *Nanjing*. Many of these institutes offer courses ranging from infant-parental training to calligraphy, handwriting and foreign languages. However, not all have qualified teachers, and this is usually reflected in the institutes' fees. The following table provides an overview of the key players in *Nanjing*.

Table 25: Key children's training providers in Nanjing

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<i>Nanjing Gymboree</i>	US	2007	1	- Early childhood development, music, art, etc. - Targets high end markets - Newly established on September 29, 2007
<b>Domestic</b>				
<i>Nanjing Dongfang Aiying</i>	China	2001	3	- Prenatal care, gymnastics, English vocabulary, sign language activities, communication - High price - Targets infants 0-4 years old
<i>Xin Aiying Baby Center</i>	China	2004	2	- Baby science, music, art, etc - Medium price - Targets infants and children 0-6 years old
<i>Nanjing Ailite Art Training Center</i>	China	1997	1	- Art, classical music, handwriting, calligraphy etc - Medium price - Targets infants and children 0-5 years old

Note: Year established, number of outlets, and notes all refer to the *Nanjing* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** Demand is largely expected to arise from English and other foreign language courses. Many famous Chinese brands have already entered the *Nanjing* market, providing courses such as art, music or children development. In terms of languages, many of the local institutes still cannot provide Native-speaking teachers, thus creating opportunities for US companies.



## Language training

[Return to Top](#)

**Market overview.** *Nanjing's language training market is relatively less established than in Shenzhen or Tianjin,* and the city has fewer foreign-invested *language training* companies. The *language* market was estimated at about \$33 million in 2006, growing at about 30% over 2005. Demand is largely driven by students and young professionals.

**Key players.** There are relatively fewer brand-name *language training* chains in *Nanjing* than in other cities. Key players like *Wallstreet* are not present in the city. Currently a large proportion of the courses offered are English testing programs. *Nanjing* has approximately 600 language institutions, although the majority are very small companies with poor teaching quality; some of the key players are shown in the table below

Table 22: Key language training providers in Nanjing

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<b>EF</b>	Sweden	2002	2	- IELTS, Oral English, Business English, Kids English - High price; Targets office workers
<b>Domestic</b>				
<b>Longre Education group</b>	China	2004	1	- IELTS, TOEFL, Interpretation, Oral training, Business training - Medium price - Collaboration with some local universities in Jiangsu Province
<b>Nanjing CANILX Modern English Training</b>	China	1999	2	- Oral English and business English - High price - Number of trainees in 2007 reached about 5000 - Customers: Nanjing LG, Ford, Siemens Automation, etc.
<b>New Oriental Education</b>	China	2003	1	- Focus on testing: IELTS, TOEFL, GRE, GMAT, SAT Business English, Oral English - Medium price, focus on rote learning

Note: Year established, number of outlets, and notes all refer to the *Nanjing* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** Demand for *English training* is driven both by students wanting to study abroad as well as graduates and young professionals wanting to increase their job opportunities in large companies. For the students segment, there is strong demand for quality-driven *language* providers offering intensive *language testing training* programs, such as CET, IELTS, TOEFL etc., although the market is already quite competitive. For the young professionals segment, there are opportunities for practical English communication courses.

## IT market

[Return to Top](#)

**Market overview.** *Nanjing's IT training market reached about \$17 million in 2006, and is expected to exceed \$31 million by 2010. In Nanjing, IT training and education takes place mainly in university courses and vocational training. There have been relatively less training courses provided for special IT certifications.*

**Key players.** There are about 1,000 *IT training* providers in *Nanjing*, among which only 20% offer training courses with special certifications, such as CISCO, ORACLE, SUN etc. Most training providers, usually small companies, offer software application and hardware training. *Aptech*, one of the top *IT training* providers in China, does not have a direct presence in *Nanjing* but it collaborates with *Nanjing Pulei Information School*. The following table provides an overview of the key players in *Nanjing*.

Table 23: Key IT training providers in Nanjing

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<b>NIIT</b>	India	2001	1	- C++, Visual Studio, ADO.NET, SQL Server, Inter VTune, Java Studio, - High price - Established training collaboration with about 300 enterprises in Jiangsu Province - Collaborate with some universities in Nanjing
<b>Domestic</b>				

<b>Nanjing Wanhe IT training</b>	China	1993	1	<ul style="list-style-type: none"> <li>- C++, Java, ACCD, JSP, MSCD, CCNP, SCJP etc</li> <li>- High price</li> <li>- Collaboration with Ericsson, Fujitsu, Sony, Phillips, etc.</li> <li>- Have trained about 50,000 people</li> </ul>
<b>Nanjing Pulei Information school</b>	China	1997	1	<ul style="list-style-type: none"> <li>- ACCP, Adobe, Photoshop, CAD etc</li> <li>- Collaborates with Aptech in Nanjing</li> <li>- Over 500 local Chinese company customers in Nanjing</li> <li>- Medium price</li> </ul>
<b>Nanjing Bowen IT Education</b>	China	2003	1	<ul style="list-style-type: none"> <li>- JAV A, 3D Animation, VB6, Oracle, web design, Delphi, Photoshop, CAD, CEAC, etc</li> <li>- Targets students aiming at career in software / IT</li> <li>- Medium price</li> </ul>

Note: Year established, number of outlets, and notes all refer to the *Nanjing* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** Over the last few years, Business Process Outsourcing (BPO) has become increasingly popular in *Nanjing*. As a result, there has been rapid growth in demand for software engineers and training providers. Given that only a handful of companies at present are capable of offering high quality training courses with state-of-the-art technology, there are good opportunities for foreign companies to serve this market.

## Soft skills training

[Return to Top](#)

**Market overview.** There are more than 60,000 companies in *Nanjing*, of which 90% are Chinese companies. There are an estimated 300,000 managers and supervisors, and the market for *soft skills training* is estimated at over \$19 million. As in many cities in China, demand for *soft skills training* in *Nanjing* is currently mainly driven by foreign companies. *Nanjing's soft skills market* has recently seen a shift in demand from simple management and human resource courses to much more sophisticated training such as negotiation and social knowledge skills.

**Key players.** *Nanjing* has more than 400 *soft skills training* companies. However it must be noted that few of these companies are specialized solely in *soft skills*, as they offer other courses such as *language*. *Nanjing's soft skills market* is characterized by two different types of companies, i.e. those serving mainly individuals and those serving companies. Training providers serving individuals have faced intense competition over the last few years. Training providers serving companies on the other hand, are dominated by a few large training companies, both foreign as well as domestic ones. The following table provides an overview of the key players in *Nanjing*.

Table 24: Key soft skills training providers in Nanjing

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<b>Clark Morgan</b>	US/ Canada / China (office founded in Shanghai)	2004	1	<ul style="list-style-type: none"> <li>- Courses include cross cultural, communication, team building, developing leaders, etc.</li> <li>- Headquartered in Shanghai</li> </ul>
<b>Top Human</b>	Canada	1995	1	<ul style="list-style-type: none"> <li>- Courses include team building and social skills</li> <li>- Relatively high price</li> <li>- Customers include: Xinguang Group, Yiyuan Motor Group</li> </ul>
<b>Domestic</b>				
<b>Nanjing Pal training consulting</b>	China	1996	1	<ul style="list-style-type: none"> <li>- Human resource management</li> <li>- Customers include: Nanjing Agriculture management company, Sanofi Pasteur</li> <li>- High price</li> </ul>
<b>Nanjing 1&amp;1 Education Consultation</b>	China	N/A	1	<ul style="list-style-type: none"> <li>- Specializes in teambuilding, other courses include chain management, leadership training, etc</li> <li>- About 7 training bases for outdoor teambuilding training</li> <li>- Customers include: Nanjing University, China PingAn, Want Want Group, etc.</li> </ul>

Note: Year established, number of outlets, and notes all refer to the *Nanjing* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** The *soft skills market* is still developing and there are potential opportunities for American companies to provide training courses that are customized to the needs of companies.

## MARKET OVERVIEW: NINGBO

[Return to Main Page](#)

### Market Overview

[Return to Top](#)

Ningbo is China's fourth largest port and a key economic and industrial hub of Zhejiang province, and the Yangtze River Delta. GDP grew 17% to reach \$36.7 billion in 2006. The city's economy is dominated by private Chinese companies, and key industries include electronics, textiles, garments, machinery, petrochemicals, and iron and steel. The city attracted \$2.4 billion of Foreign Direct Investment in 2006. Key MNCs which have invested in Ningbo include Esso, Xerox, and Samsung. The city is only 160 km south of Shanghai, but is separated from Shanghai by the Hangzhou bay. A bridge linking the two cities stretching 36 km over the sea was completed in June 2008, which greatly improved Ningbo's accessibility to Shanghai.

### Summary: Education and Training market in Ningbo

Ningbo has the least developed training market of all the five cities analyzed in this report, however this represents good opportunities for American companies. In most training sectors, many large companies have yet to set up branches in Ningbo, or have only done so in the past 1 – 2 years. There are good opportunities especially for conversational English, English testing, and IT training.

### Children's education

[Return to Top](#)

**Market overview.** Although Ningbo's children's education and training market has experienced outstanding growth of about 30% annually, the market is still at its early stages, worth about \$13 million in 2006. In the past, many parents in Ningbo were somewhat unaware about children's training programs. There are about 500,000 children aged between 0 and 10, and only about 5% of these children attend training programs. However, with rising disposable incomes, more parents are spending on extra lessons for their children.

**Key players.** There are about 300 children's education and training centers. Currently, many of the training centers or private training providers are perceived as unprofessional and the demand for foreign high quality institutions with professional teachers is high. The following table provides an overview of the key players in Ningbo.

Table 21: Key children training providers in Ningbo

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
Gymboree	US	2006	1	- Targets high-end market - Recent entrance in Ningbo, partly reflects early developing stage of the market
<b>Domestic</b>				
Qinqin baobei baby center	China	2003	2	- Baby development, early reading ability, games, creativity - High-end; Good reputation and facilities
Ningbo Nanfang beibe	China	2004	2	- English vocabulary, games, parent training, baby development - Mid-high end price, chain store with 60 centers distributed in China - Targets children 0-6 years old
Ningbo golden key baby study institute	China	2001	1	- Communication, English, Chinese, music, creativity, games - Mid-high end price, the first education center in Ningbo which is dedicated to education of infants 0-3 years old - Good reputation in Ningbo

Note: Year established, number of outlets, and notes all refer to the Ningbo market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** There are many wealthy parents in Ningbo willing to spend on children's education, as long as the quality of teaching is high. Thus there are good prospects for foreign companies with strong brands known for offering high quality programs. Popular programs include music, art, creativity, and English.

## Language training

[Return to Top](#)

**Market Overview.** The *language training* market is still relatively small, estimated at about \$13 million in 2006. As one of the major seaports in China, there are a large number of trading and logistics companies in *Ningbo*. Demand for *language training* is thus partly driven by employees of these companies, or graduates looking for employment in these companies. *Language* courses offered by private institutions still focus predominantly on *language testing*, but a wider variety of courses are starting to be offered, e.g. Oral English.

**Key players.** *Ningbo* has less than 100 *language* institutions and training centers. Most of the major brand-name *language* institutions have only entered *Ningbo* in the last 1-2 years. The following table provides an overview of the key players in *Ningbo*.

Table 18: Key language training providers in Ningbo

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign invested</b>				
<i>EF</i>	Sweden	2002	1	- IELTS, Oral English, Business English - High prices - Customers include both children and adults
<b>Domestic</b>				
<i>Web international English school</i>	China	2006	1	- English E- learning, business English - Targets corporate clients and professionals, high end market
<i>Longre Education Group</i>	China	2007	1	- IELTS, TOEFL, GRE, Oral English, company training - Medium prices
<i>Contemporary Education</i>		2002	1	- Korean, Japanese, English - Medium prices - Targets college students and professionals
<i>ONLY Education Group</i>		2005	1	- Children/Adult English, CET, Interpretation - Medium prices - Targets students and professionals
<i>Ningbo Sunshine Foreign Language Education Co., Ltd</i>		2001	1	- Children/Adult English, CET, Interpretation - Low-mid price - Targets students

Note: Year established, number of outlets, and notes all refer to the *Ningbo* market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** With more students increasingly furthering their education abroad, *training* courses tailored to pass English language tests such as IELTS, TOEFL, GRE, and GMAT have become increasingly popular. In addition, there are also good prospects for *business English* and *English communication* courses.

## IT training

[Return to Top](#)

**Market overview.** *Ningbo's* IT industry is still in early developing stage, and it is considered a priority industry by *Ningbo's* authorities. Within the next 5 years, the city plans to support the development of the IT industry in four areas: promoting industrial clustering, develop software enterprises, accelerate the development of the IT industry, and strengthen *IT education and training*. *Ningbo's* *IT training* market was estimated at over \$9 million in 2006. Currently, there are more than 1,800 software engineers in *Ningbo*, largely specialized in CAD/CAM programming. Hence it is not surprising that *IT training* classes consist largely of *software application training* such as *CAD*, *Graphic design*, and *network hardware*. High-end *training* programs, e.g. for *software development*, are still very limited.

**Key players.** The number of *IT training* providers in *Ningbo* is estimated between 120 and 130, and not more than 70 of these companies are registered. The market has consolidated in the last few years with small sized training providers being driven out of the market, largely by key players such as *Aptech* or *ChinWin*. The following table provides an overview of the key players in *Ningbo*.

Table 19: Key IT training providers in Ningbo

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Foreign-invested</b>				
<b>Aptech Ningbo training center</b>	India	2005	1	- Network hardware/ engineer, web design, software engineer - BENET is a key course of Aptech Ningbo Targeted to network engineers
<b>Domestic</b>				
<b>ChinWin Education Group</b>	China	2005	3	- CAD, web/graphic design, Network hardware, Photoshop - Customer industries: manufacturing (mold design), advertising
<b>Wish Education Technology Co., Ltd</b>		2004	2	- Software Engineer, Web design, JSP, Java, Net etc - One of the largest vocational education institutes in Ningbo
<b>Ningbo Galaxi Education center</b>		1999	1	- MCSE, CISCO, Adobe, web design, java, oracle - Customers: network engineers, advertising companies

Note: Year established, number of outlets, and notes all refer to the Ningbo market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** There are good opportunities across for most types of *IT training* (especially *web design* and *network hardware*) given the government's plan to develop its IT industry. Demand is expected to be driven by graduates looking to gain employment in IT or software companies.

## Soft skills training

[Return to Top](#)

**Market overview.** Ningbo, like the rest of Zhejiang province, is characterized by a large number of private Chinese enterprises. These are generally small-medium sized firms, who do not necessarily appreciate the value of *soft skills training*. Thus the *soft skills training* market is still very small, estimated at about \$7 million in 2006. Nevertheless there was strong growth of about 17% over 2005.

**Key players.** The number of *soft skills training* institutes is estimated to be about 200, however only few of them are successful. There were no notable foreign-invested *soft skills training* providers in Ningbo, and some larger companies may hire trainers from Shanghai. The following table provides an overview of the key players in Ningbo.

Table 20: Key soft skills training providers in Ningbo

Key players	Country of origin	Year established	Number of outlets	Notes
<b>Domestic</b>				
<b>Ningbo Shengjing Consulting</b>	China	2005	1	- Chinese management, enterprise spirit, performance improvement etc - Customers: Sino-chem Ningbo, Ningbo Bodao etc.
<b>Ningbo Xingji Management Training Center</b>	China	1996	1	- Leadership, team building, quality management - Targets to mid-large private Chinese enterprises in Ningbo, good reputation
<b>Ningbo Zhuobo Managment</b>	China	2005	1	- Brand strategy management, quality/cost improvement - Aims at mid-large enterprises - Customers in manufacturing industry e.g. machinery manufacturing, tooling and molding
<b>Ningbo Zhengwei Consulting</b>	China	2000	1	- Development training, team spirit training, management training - Strong in human resource training - Targets at mid-sized enterprises

Note: Year established, number of outlets, and notes all refer to the Ningbo market. Source: multiple sources including company websites, publications, news releases, and JLJ analysis

**Best prospects.** Mid-term opportunities exist for American training providers offering *practical leadership training* courses to private as well as large state-owned enterprises. There is also increased demand for *online management training*, as it is generally less expensive and more affordable for private Chinese companies.

## CONSIDERATIONS FOR US COMPANIES

[Return to Main Page](#)

### Key opportunities

[Return to Top](#)

1. **Tailored courses.** Despite increasingly strong competition among training companies in key Tier 1 and some Tier 2 cities, opportunities exist for US institutions in offering study materials, and providing e-learning and intensive training programs for young professionals and business people. Tailored courses, customized to the specific needs of companies and individuals, are increasingly popular.
2. **Practical skills training.** There is strong demand for practical skills training, especially oral English skills or managerial and soft skills. Although companies still represent the major customers, more and more individuals are willing to spend for their own training.
3. **Brands and quality.** In general, customers prefer and are willing to pay for foreign-branded training providers, as foreign brands are associated with good quality. In the children's education segment, parents are willing to spend on high-priced courses for the reputation and international teaching methods. In the soft skills segment, some customers regard local companies as lacking international perspective. To emphasize on quality training, many companies have started to offer trial periods for potential students.
4. **French language.** Although English is still the biggest language market, there is increasing demand for French language training. Speaking French is considered "fashionable", and it is therefore becoming popular as a third language (after Chinese and English). In addition, the increasing economic co-operation between China and French-speaking African countries creates job opportunities for French-speaking Chinese.

### Key challenges

[Return to Top](#)

1. **Strong competition.** Although the training market is growing at more than 20% annually across all segments, there is strong competition, especially in the English and IT training market. In addition, customers are increasingly wary of institutes wanting to make quick money and employing largely unqualified teachers. Most customers prefer well-established players over smaller unknown companies. Thus it may be challenging for new entrants without a track record in China to compete.
2. **Intangible value of soft skills training.** The key customers for soft skills training providers are still MNCs as many private Chinese companies are still hesitant to invest in soft skills training for staff. The biggest concern for Chinese companies is that soft skills are difficult to quantify and its effectiveness is difficult to measure. However, there is long-term potential, especially to serve larger Chinese companies.
3. **Regulatory approval.** The government is strict on private companies offering children's education, especially where printed teaching material are used. Although local enforcement still varies, some cities are increasingly strict. For a foreign entrant, the regulatory environment is complex and difficult to navigate, making it necessary to seek advice from a professional firm on the registration of an education / training business.
4. **IPR issues.** IPR infringements are still an important concern for foreign companies, with the responsibility to track down violators left to the IP owner itself. It is recommended for companies to register all trademarks and brand names (both English and Chinese) before entering the market.

### Marketing Strategies

[Return to Top](#)

There are a variety of marketing channels that are commonly used among training institutes in China, as highlighted below.

**Advertising.** Advertising, though expensive, remains an important marketing channel to raise brand awareness. In China, commonly used advertising forms for training companies (especially language schools) include poster ads, leaflets, print ads and radio. In particular, poster ads are frequently found in subways, taxis, bus stops, malls or elevators.

**Online marketing.** Online marketing or advertisement is a key way to reach out to Chinese students and young professionals. Online marketing is frequently used by language providers in combination with promotions and free study gifts, such as learning methods or access to the institute’s chat forum.

**Direct marketing.** Direct marketing is a very popular and cost-effective way to send out course descriptions or special offers to increase brand awareness. Institutes such as Wall Street English, frequently send emails to potential customers asking them to enter a price draw or register for a free test.

**PR promotion.** PR promotions are very common among institutes offering MBA or other *managerial training* programs. Foreign MBA providers frequently organize seminars and invite international, well-known guest speakers to discuss popular current affairs topics.

**Third party advocacy / word-of-mouth.** Third party advocacy is a highly effective tool of persuasion in the Chinese market. It can range from simple word-of-mouth from satisfied customers, to mentioning quotes from well-renowned alumni on marketing material, or inviting them as guest speakers at events.

## Market Access

[Return to Top](#)

American companies planning to establish an education or *training* institute in China have two main setup options: 1) partnering with a Chinese educational institution, e.g. a college, university, or 2) setting up a commercial entity in the form of either a JV or WFOE.

**Partnering with a Chinese educational institution** is mainly used by “core education” providers, for example higher education institutes, or MBA institutes, which offer state-recognized degrees. This is heavily regulated, has a long investment approval process and the institutes must be non-profit.

**Setting up a commercial entity** is used for majority of “non-core education” training providers, which only offer company certifications, and not state-recognized degrees. The approval process is less strict; however, commercial entities are theoretically not allowed to recruit students publicly and therefore are only allowed to market to companies and professionals (In practice, enforcement of this rule varies among cities). Commercial entities that want to offer *children’s education* need to obtain a special license as *children’s education* is classified under “core education”. The table below summarizes the key differences between the two options.

Table 26: Educational Institution vs. Commercial Entity

Stage	Characteristics	Educational Institution	Commercial Entity
Registration	<b>Market entry barriers</b>	High, difficult to get approval	Low, relatively standard approval process
	<b>Market entry requirements</b>	Must be a qualified educational body in home country	Only needs to be a legally registered entity (e.g. WFOE or JV)
	<b>Resources required</b>	Must provide evidence of qualified teachers and facilities	Must provide evidence of financial resources
	<b>Teaching resources</b>	Must provide evidence of well-qualified teachers and facilities	Must provide evidence of financial resources
Operations	<b>Profit-making</b>	Must be non-profit	Can make profit
	<b>Recruitment of students</b>	Public recruitment allowed	Public recruitment not allowed; theoretically, may only targets adults and corporate professionals
	<b>Certification of courses</b>	May issue government-recognized certificates, e.g. degrees, diplomas	Only permitted to issue company certificates

Source: JLJ analysis based on multiple sources including Ministry of Education and US Commercial Service

**Tier 1 vs Tier 2 cities.** Larger players already have a well-established presence in Tier 1 and key Tier 2 cities. One popular model for foreign *training* providers is to enter via Tier 1 markets by establishing a JV/WFOE and then expanded into Tier 2 cities through franchising or partnerships.

**Conclusions.** The *education and training* market is growing at more than 20% annually across most sectors, and offers significant opportunities for US companies. Most of the key players are concentrated in Tier 1 cities and key Tier 2 cities such as *Shenzhen* and *Tianjin*, while the *training* market in many other emerging cities like *Ningbo* are still relatively undeveloped. In general, foreign brands are well accepted, and providing high quality teaching with customized programs are key factors for success.

## TRADE EVENTS

[Return to Main Page](#)

### China Education Expo 2007

Website: [www.chinaeducationexpo.com](http://www.chinaeducationexpo.com)

Location: Beijing  
Date: 19-21 October, 2007

Location: Qingdao  
Date: 23 October, 2007

Location: Wuhan  
Date: 25 October, 2007

Location: Shanghai  
Date: 27-28 October, 2007

Location: Xi'an  
Date: 30 October, 2007

Location: Chengdu  
Date: 1, November, 2007

Location: Shenzhen  
Date: 3-4, November, 2007

### Beijing International Education Expo 2008

Location: Beijing  
Date: to be confirmed  
Website: <http://www.edufair.com.cn/en>

### China (Shenzhen) International Education & Training Expo 2008

Location: Shenzhen  
Date: 29 Feb – 2 March, 2007

## RESOURCES & KEY CONTACTS

### Ministry of Commerce

Tel: +86-10-65284671  
Website: <http://english.mofcom.gov.cn/>

### Ministry of Education

Tel: +86-10-66096114  
Website: <http://www.moe.edu.cn/english>

### China Workers' Education and Vocational Training Association

Tel: +86-10-84270866  
Website: <http://www.zhongguozhixie.com.cn/english.asp>



## **Methodology**

This research is based on a combination of secondary and primary resources as well as a continuous analysis and elaboration of all key facts and data throughout the research. Secondary resources included The JLJ Group, US Commercial Office, China Statistics Bureau, and other sources. Primary resources include interviews and interactions with key industry players.

## **About the authors**

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The JLJ Group is a one-stop service provider assisting international companies entering or growing in the China market. JLJ has already served more than 400 clients – including Fortune 500, SMEs and government organizations - in more than 10 years of activity in China. JLJ provides services in five areas – Market Research & Consulting, Corporate Formation, Human Resources, Tax & Accounting and Business Process Outsourcing – to support the business needs of foreign companies at different stages of their China projects.

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[Return to Main Page](#)