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1 INDUSTRY AND MARKET SITUATION

1.1 Education Policy

1.1.1 Hong Kong

Hong Kong is one of the global economic metropolises and home to 7.5 million people of different cultures and countries. About 10,000 foreign companies have established branches or representative offices in Hong Kong. Hong Kong serves as a gateway for doing business in China and other Asian countries. Some advantages:

- There are no foreign ownership restrictions.
- The tax regime is low, simple and predictable. There is also no tax on offshore income, capital gains, dividends, estate or sales.
- Rule of law and an independent, experienced judiciary based on British common law.
- Free movement of capital, talent and goods.

However, social tensions are rising and ongoing protests since summer 2019 are signs of a political crisis Hong Kong is going through.

Around 200 companies from Austria have set up their businesses in Hong Kong. Nearly 1,000 Austrians live and work here. About 25% of all Austrian exports to China are handled via Hong Kong or South China. Because of visa-free entry, an extensive international flights network and English as one of the two official languages, Hong Kong holds many important conferences and trade fairs. Companies use Hong Kong as a test market or stepping stone to enter the Chinese or Asian markets.

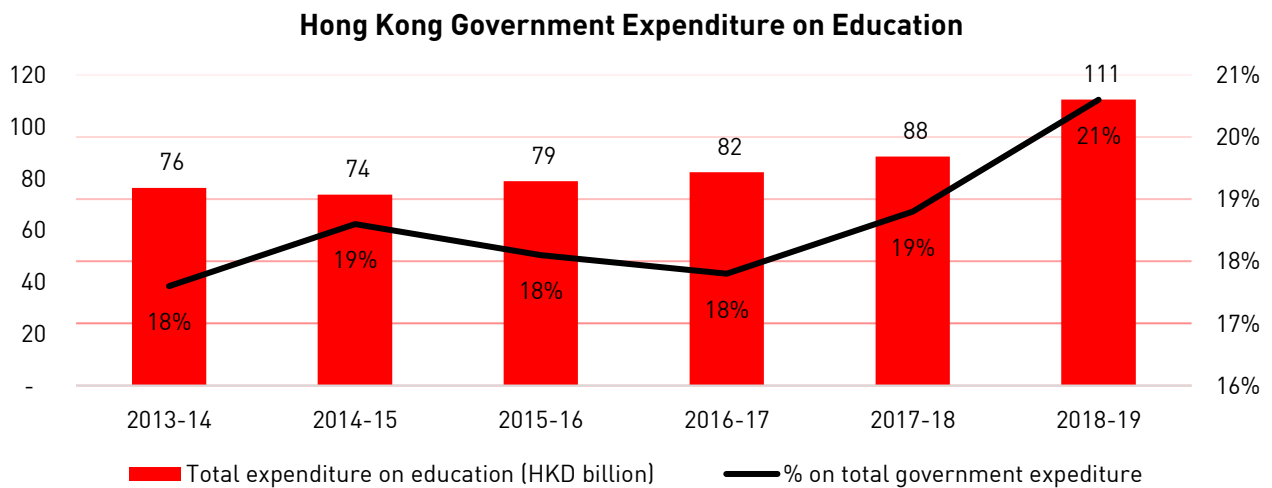
Hong Kong has been a special administrative region (SAR) of the People's Republic of China since 1997. As a special administrative region, Hong Kong is granted not only its own monetary and legal system, but also its own education system. The Hong Kong Basic Law (1990: Art. 136) stipulates the extensive autonomy and liberal organization in the field of education:

“On the basis of the previous educational system, the Government of the Hong Kong Special Administrative Region shall, on its own, formulate policies on the development and improvement of education, including policies regarding the educational system and its administration, the language of instruction, the allocation of funds, the examination system, the system of academic awards and the recognition of educational qualifications.”

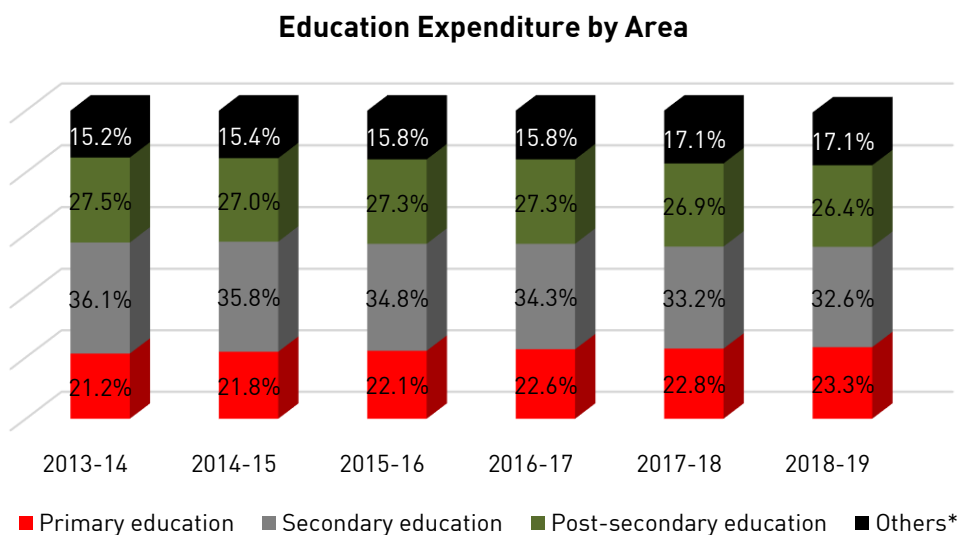
Within the Hong Kong SAR government, the Education Bureau (EDB) is responsible for education. According to the principles of 'one country, two systems', Hong Kong shall continue to be granted a great deal of autonomy in many areas including education at least until 2047. The Hong Kong education system is based on the British model, although nowadays use of Chinese as a medium of teaching is becoming more important and the influence of China's education principles is surely rising (e.g. as to be observed in history education content, signing of China's national anthems).

In the Hong Kong 2020/2021 budget, estimated government expenditure on education amounts to HKD 112.3 billion (EUR 13.4 billion), accounting for 15.4% of estimated total government expenditure. In Austria, it would be comparatively about 5.4%. One has to consider, however, the overall public spending in Hong Kong is comparatively low when compared to Austria. Hong Kong praises itself as an economy with a small government share and low tax rates.

In the past three years, the Government has introduced a number of policies and allocated over a hundred billion HKD (over EUR 12 bln) to support a series of measures for the development of innovation and technology (I & T). Striving to promote STEM (science, technology, engineering and mathematics) education and with the aim of bringing new blood into the I & T industry, the Hong Kong government has set aside HKD 40 million (EUR 4.7 million) to subsidise short-term internships for undergraduates and postgraduates taking STEM programmes in local universities.



Source: Education Bureau Hong Kong SAR (<https://www.edb.gov.hk/en/about-edb/publications-stat/figures/gov-expenditure.html>)



Source: Education Bureau Hong Kong (<https://www.edb.gov.hk/en/about-edb/publications-stat/figures/gov-expenditure.html>)

These high expenditures and developments have made Hong Kong one of the best education systems in the world and thus also an important market with great opportunities for Austrian companies and institutions in the education sector to offer products or services or to attract students to study in Austria. Moreover, engagement in Hong Kong's education sector can also open a door to many other Asian countries at the same time.

With the granted autonomy in its education systems for years to come, an impressive academic environment, its proximity to mainland China and having at the same time an international orientation, a vibrant multi-cultural environment, internationally recognized institutions, and a welcoming, open policy towards international students, Hong Kong is a natural fit as one of the global education hubs.

1.1.2 China

Education in China is a state-run system of public education run by the Ministry of Education. All citizens must attend school for at least nine years, known as the nine-year compulsory education, which the government funds. It includes six years of primary education for children starting at age six (grade 1 – 6), and three years of junior secondary education (middle school) for ages 12 to 15 (grade 7 – 9). Some provinces may have five years of primary school but four years for middle school. After middle school, there are three years of (non-compulsory) senior secondary education (high school), grade 10 – 12. Government funds the system but schools can still charge miscellaneous fees.

This “K-12” education system in mainland China is the largest in the world. According to the Ministry China had in the year 2017 270 million students and 9.49 million teachers. 10.31 million students took in June 2019 the National Higher Education Entrance Examination (Gao Kao) in China. China’s public education budget in 2018 was RMB 3.7 trillion (around 480 EUR) or over 4% of its gross domestic product (GDP), which was also an increase of over 8 percent compared to the previous year.

1.2 Education System

1.1.3 Hong Kong

General

There are three groups of education providers in Hong Kong:

- 1) Public schools provided by the government which are free of charge
- 2) Direct subsidized schools (DSS) which receive subsidies from the Government and school fees from students
- 3) Private schools which are only funded by school fees charged to students

In addition, one can also distinct between “regular” or “traditional” educational institutions and foreign educational institutions (International schools or English Schools Foundation).

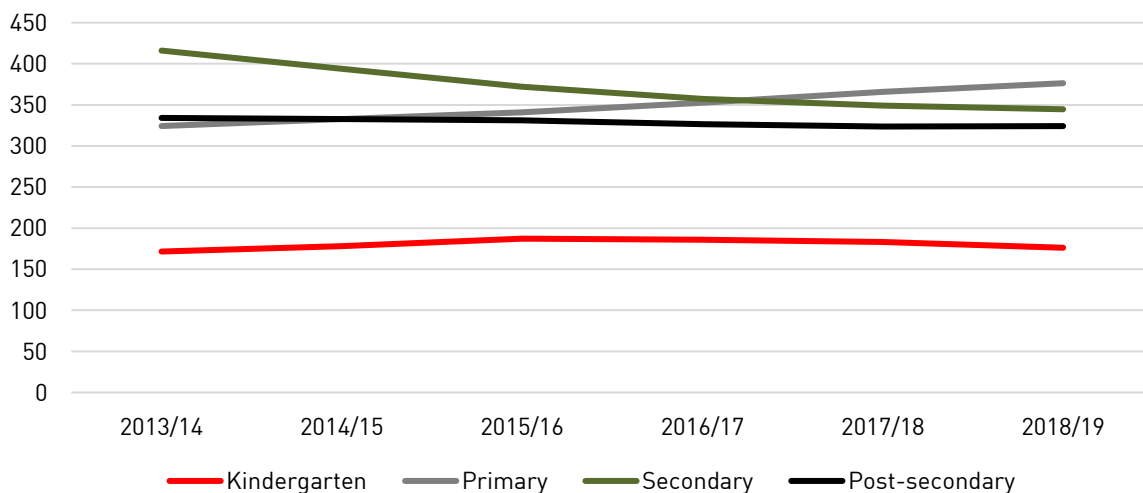
Hong Kong has a compulsory education of twelve years, which starts from the age of six. Most children attend in addition kindergartens and preschools from the age of three. According to the World Bank, the school attendance rate at the primary level was around 98.6%.

Hong Kong’s birth rate has fallen in recent years to 1.12 birth per woman (2017) while there has been a slight increase in mainland China to 1.68 birth per woman. The overall relatively constant figures of children in Hong Kong schools is mainly due to more children from mainland China crossing the border to attend school in Hong Kong, also called “Chinese education tourism”. About 80,000 students from China commute up to 5 hours a day to attend schools in Hong Kong. 85% of these mainland Chinese children continue their education and Hong Kong and study at a university in Hong Kong, very often with the intention to work there after graduation.

As a result, kindergartens and primary school places for the local population, both in the northern and increasingly southern parts of Hong Kong, are having problems to cope with the huge number of pupils. New schools for Hong Kong students are being built in Shenzhen, a city with around 13 mio. people just across the border in mainland China. The subway systems of Hong Kong and of Shenzhen allow an easy transfer. Many Hong Kong parents have reservations about sending their children to mainland China because they doubt the quality of the education and want to avoid politically motivated teaching content.

Within a framework to promote cross-border regional cooperation between major cities in Guangdong Province, Hong Kong and Macao titled the "Greater Bay Area Initiative" also education providers are encouraged to work closer together, align their policies and allow students and teachers more mobility between the still different systems. China's Ministry of Education published in Nov. 2019 detailed arrangements of a Scheme for Hong Kong students to study at Mainland higher education institutions. 122 higher institutions from 21 provinces in mainland will accept applications from candidates sitting for the Hong Kong Diploma of Secondary Education (HKDSE) Examination in 2020. Some well-known higher institutions in mainland China have joined this scheme, including Tsinghua University, Fudan University and Peking University.

Student Enrolment by Level of Education in Hong Kong (in thousands)



Source: Education Bureau Hong Kong (<https://www.edb.gov.hk/en/about-edb/publications-stat/figures/enrol-by-level.html>)

Kindergarten

A kindergarten is the first educational option for children similar to Austria. Nurseries in Hong Kong are privately run (either non-profit or for profit). Monthly fees between EUR 800 and EUR 2,000 are quite common. Kindergarten operators can apply for Government subsidies through the "Pre-primary Education Voucher Scheme" (<https://www.edb.gov.hk/en/edu-system/preprimary-kindergarten/preprimary-voucher/index.html#PEVS%20list>).

The kindergarten curriculum no longer describes the role of kindergarten teachers as knowledge brokers and providers of play opportunities, but as real learning companions and coaches for finding interests. The kindergartens are continuously evaluated within a quality assurance framework published by the Education Bureau.

Parents expect Kindergarten teachers to prepare children for further education and for being admitted to good schools. A large number of tutoring centers for preschool children have been set up in recent years, as it is quite common for 2- to 3-year-old children to take extra lessons and have preparation sessions for school interview or evaluation tests. The pressure all over Asia including in Hong Kong to perform is very high from an early age.

Primary School

Hong Kong's government provides free education in public schools. In September 2018, 301,891 children were enrolled in 456 public primary schools. In addition to public schools, 21 directly subsidies schools also offer primary education with fees ranging from EUR 1,200 to over EUR 6,000 per school year for 2019/2020. 64 private primary school providers charge EUR 1,200 to over EUR 20,000 per school year. 22,720 students have enrolled in 46 international schools. From primary level on Hong Kong schools impose strict school rules. School uniforms are standard in most schools.

Primary Schools		No. of Schools	No. of Students	School Fees (Euro per year)
Local	Government	34	23,159	Free
	Aided	422	278,732	Free
	Direct Subsidies	21	15,759	EUR 1,200 to over EUR 6,000
	Private	64	32,095	EUR 1,200 to over EUR 26,000
International	ESF and others	48	22,720	EUR 12,500 to over EUR 24,000
Total		589	372,465	

Secondary School

In the secondary level, there are public institutions, which are free of charge. Although 392 public schools existed in the 2017/2018 school year, the importance of private educational institutions is growing, as they are regarded as a "good" or even "better" alternative. Although there are nearly 50 international schools, including a large number of private ones, there is usually a long waiting list and school fees are high at an average of EUR 6,300 per school year. Foreign parents living in Hong Kong and more and more local parents are interested in sending their children to international schools. International schools offer their students an easy transfer option to continue their tertiary education abroad.

Secondary Schools		No. of Schools	No. of Students	School Fees (Euro per year)
Local	Government	31	20,574	Free
	Aided	359	233,630	Free
	Caput	2	1,221	Free
	Direct Subsidies	60	45,601	EUR 1,200 to over EUR 9,800
	Private	20	6,994	EUR 1,200 to over EUR 27,000
International	ESF and Others	34	17,478	EUR 12,500 to over EUR 26,000
Total		506	325,498	

International schools' school fees: <https://www.edarabia.com/hong-kong-school-fees/>

In-service Training

Hong Kong generates more than 90% of its economic output by providing services. Hardly anything is produced in Hong Kong anymore. Like in many other parts of the world, skilled workers are in short supply. It is becoming increasingly difficult to attract young people to work in trade and to provide simple services. Parents encourage their children to pursue an education that prepares them to work in finance, law or in the medical field.

An apprenticeship system is available mainly in technical occupations and in the construction sector. The importance of continuous training of workers already employed is being more often recognized. The government subsidizes courses at universities and other educational institutions through the Continuing Education Fund (<https://www.wfsfaa.gov.hk/cef/en/index.htm>). Today's work environment requires employees to keep up with the latest technologies. An important institution for strengthening the competitiveness of Hong Kong companies and better qualification of workers is the Hong Kong Productivity Council (<https://www.hkpc.org/en>), which also cooperates with the Fraunhofer Institute (<https://www.fraunhofer.de/en.html>) and WIFI Austria (<https://www.wifi.at/>).

Tertiary Level

Hong Kong is well known for its higher education offer and has gained an excellent international reputation. In international rankings such as the Times Higher Education World University Ranking and the Quacquarelli Symonds (QS) University World Ranking, Hong Kong universities often achieve top positions: The University of Hong Kong ranked 25th and Hong Kong University of Science and Technology ranked 32nd in the "2020 QS World University Ranking", and 35th and 47th respectively in the "Times Ranking". In the Financial Times' "Executive MBA Ranking" the "Kellogg/ HKUST Business School" even ranked 2nd world-wide (<http://rankings.ft.com/businessschoolrankings/executive-mba-ranking-2019>)

Hong Kong has 22 degree-awarding higher education institutions including 11 universities. The annual tuition fees for a bachelor's degree program are comparatively low, averaging EUR 5,000 per year, but for master degree, the annual costs can go up to EUR 32,000 per year, while as a PhD programs (for doctoral students) costs between EUR 13,000 and EUR 22,000. The elite "Kellogg / HKUST Executive MBA" program's (<http://emba.ust.hk/>) tuition fee is EUR 167,000 for 2021. Students with financial needs can apply for a scholarship or a supported loan.

In addition to local students, there are also many international students in Hong Kong, mainly from exchange programs. In 2017-18, there were over 6,000 overseas exchange students studying in the city. Some Hong Kong universities provide a short period of exchange study abroad for their students. However, it is not so easy to attract Hong Kong students to exchange program abroad for a longer period as this might defer their graduation time. This can also be observed in respect to Hong Kong - Austria: Usually there are sufficient Austrians who want to study in Hong Kong for a longer period but too few from Hong Kong who are interested in going to Austria.

Currently, there are more than 1,200 foreign courses offered in Hong Kong by more than 200 overseas institutions in cooperation with 11 publicly funded institutions. The government is seeking to further strengthen Hong Kong's role as a regional education center, especially for Asia, through internationalization and diversification.

Hong Kong, like many European countries, has a qualifications framework (QF) (<https://www.hkqf.gov.hk/en/home/index.html>) to help classify acquired qualifications in the academic, vocational and continuing education sectors. This is a useful tool for both, employers and employees, to

assess someone's qualifications. The framework is divided into 7 levels, each with 4 characteristics ("Knowledge & Intellectual Skills", "Processes", "Application, Autonomy & Accountability" and "Communication, IT and Numeracy").

In Hong Kong, many students will study abroad in major English-speaking countries such as U.K., U.S., Canada and Australia. If they opt to go to Europe, the U.K. is normally the first choice followed by France and Germany. The number of students going to Austria is still low. However, after promotions in recent years, the number has been growing year by year. With the "Working Holiday Program" (<https://www.whs.gov.hk/en/partners.php?location=Austria>, <https://www.bmeia.gv.at/en/austrian-general-consulate-hongkong/travels-to-austria/working-in-austria/>), up to 100 Hongkongers under 30 years can go to Austria for holidays and to work for 12 months.

1.1.4 China

In mainland China, children attend primary school from 6 to 12 years old and finish compulsory schooling after another three years in middle school. After that, there are various ways to guide the child's future career. With a passed entrance exam they can attend upper secondary school. Otherwise, they can choose among vocational schools and technical colleges. Another choice is to attend vocational colleges in which young people are trained in workplace for 2 to 4 years.

The upper secondary school is completed with the National College Entrance Examination "Gaokao" which is considered a major test and decides on further options. Under the so-called "3+X" model for this exam, students must take exams in three compulsory subjects, Chinese, Math and a foreign language, and six other subjects in the Social Sciences or Natural Sciences, within three days. There are 150 points for compulsory courses and 100 points for elective courses. The total number of points determines which University the student can attend. The subsequent bachelor's degree program in mainland China and Hong Kong lasts for 4 years, followed by a master degree program for 2-3 years.

Nearly one-fifth of China's population is younger than 15 years. Education is therefore very vital for China. With the rising economic growth in many parts of the country, people are willing to spend more on kids' education. The demand for well-trained and well-educated staff is booming. The value of China's education market has nearly doubled from 2015 to 2020 (from USD 240 billion to USD 450 billion). According to Research and Markets "[China Education Market \(K-12, After-School Tutoring & Higher Education\) Report: Insights, Trends and Forecast \(2019-2023\)](#)", the Chinese education market is estimated to reach USD 573 billion in 2023, growing at a compound annual growth rate of 11.3% for the period spanning from 2018-2023.

China's Ministry of Education (MoE) provides a wide range of laws and guidelines covering the entire educational spectrum - from kindergartens to universities, private and public institutions, and academic and professional education that improves the quality of the provision of schools and universities. The government also allows, under strict conditions, some private investment in education.

The growing demand for education attracts local and international investors and suppliers, especially in the richer coastal and some inland cities.

University

Some of China's universities are among the best in the world. According to Times World University Rankings 2020, Tsinghua University in Beijing is the best in Asia and ranked 23rd in the world. Other famous universities including the Beijing University and Fudan University in Shanghai are also ranked among the "top 50" according to QS World University Rankings. The best Austrian University, the University of Vienna, ranked 154th in QS Ranking and 134th in Times.

Times World University Ranking: <https://www.timeshighereducation.com/world-university-rankings/2020/world-ranking>)

QS World University Ranking: <https://www.topuniversities.com/university-rankings/world-university-rankings/2020>

The competition for entering a prestige university in China is extremely high. In 2020 over 10.7 million students were enrolled for the National College Entrance Examination. Some students will also choose to study abroad. There are a few factors they will consider when choosing a university, which include country, language (English preferred), security, living environment etc.

Austria also sees some interest from students from mainland China to study in Austria. Especially undergraduate program offered in English are in demand such as Bachelor Programs in Economics, Tourism, Music, Art, Technology and Business. One example is "Modul University Vienna" which has been presenting itself at school events and community activities for years and which can already see a considerable Chinese student base in its tourism and management programs. From 2016 Modul University Vienna has been cooperating with the Nanjing Tech University Pujiang Institute to offer Chinese students an internationally-established tourism degree awarded by Modul University Vienna. (<https://www.modul.ac.at/about/branch-campuses/modul-school-of-tourism-and-hospitality-management-nanjing/>)

China's compulsory education sector does not allow private investments. Otherwise China's education sector offers a wide range of opportunities in various institutions – from setting up language school, children training centers to private education and international schools. Chinese parents are very interested in their children attending special training programs for sports, language (especially English), IT and accounting. The Austrian company "Hirsch Academy" (<http://www.ehirschacademy.com/>) offers courses for students in Luoyang, Henan province, China.

For University education, many Chinese students consider studying abroad and the U.S. and the U.K. is often their first choice. When they pick a university, they would prefer to obtain a degree, which is also recognized in China. This is very important when they return to China to look for a job after graduation. Some Chinese students not only consider studying abroad but also want to emigrate altogether.

Compare University entrance requirements of Hong Kong and mainland China

	HONG KONG	MAINLAND CHINA
Duration of University	4 years	4 years
University Entrance Exam	HKDSE (Hongkong Diploma of Secondary Education Examination)	Gaokao (National College Entrance Examination)
Exam Period	March 27 - May 2	June 7 - 9
Exam Results Release Date	July 8 (August 3 -- announcement of program offered by local university) *3322 is the min requirement (Level 3 in English & Chinese. Level 2 in Math & Liberal Studies)	End of June

1.3 Trends

1.1.5 Hong Kong

The government is trying to further establish Hong Kong as an educational center in South East Asia and to make it more attractive as a location for both international students and institutions.

Lifelong Learning

Hongkongers are paying more attention to lifelong learning and adult education. The Hong Kong Education Bureau promotes lifelong education through various programs and funds, such as Continuing Education Fund (<https://www.wfsfaa.gov.hk/cef/en/index.htm>), Professional Services Advancement Support Scheme (<https://www.pass.gov.hk/en/home/index.html>), Quality Education Fund (<https://www.qef.org.hk/>) as well as tax deductible continuing education expenses. Universities and private institutions provide more than 1,200 short and further education courses for adults. Specially, The Open University of Hong Kong (<http://www.ouhk.edu.hk/>) and Centre for Lifelong Learning Research and Development of the Education University of Hong Kong (<https://www.eduhk.hk/cllrd/index.php>) target those mature students.

Tuition / Music / Sports Training

With a strong aspiration for academic advancement and amidst intense examination pressure, many local students attend private tutorial lessons for supplementary learning. The competition is very keen and students usually start private tuition from primary school or even from kindergarten. Many students will have extra tuition class to prepare for University entrance exam, the Hong Kong Diploma of Secondary Education (DSE) (<http://www.hkeaa.edu.hk/en/hkdse/>) or the International Baccalaureate (IB) (<https://www.ibo.org/>). Some surveys suggest that the ratio of taking supplementary private tutoring could go up to 50-75% in coming years.

Extra lessons for musical instruments and sports are also in high demand. Parents believe learning musical instruments and sports will improve children's profile and increase their chance when applying at elite schools or finding job in the future.

The "Vienna Boys Choir" (Wiener Sängerknaben) teamed up with local partners and has set up a "Vienna Boys Choir Music Academy Foundation Limited" (<http://vbcmf.org/>) in Hong Kong. The Foundation offers music programs for young girls and boys, organizes up to 300 performances per year and would like to set up a school for local and Asian students to pursue choir singing and at the same time regular study content.

E-Learning

E-learning is very popular in Hong Kong. Some kindergarten and primary schools have already incorporated iPad or computer in their teaching. Many schools use eClass (<https://www.eclass.com.hk/en/>) and Edmodo (<https://www.edmodo.com/>) for communication between school, teachers and parents. There are also private platforms that offer online courses to enable local and time-independent learning. Universities are also following this trend. Some offer part of the course, or even the entire course online. The number of users is constantly increasing.

In view of the COVID-19, most schools delivered homework to pupils using online platform like eClass. Some schools held online teaching sections using Zoom, Skype or Google Hangouts on weekdays. The Hong Kong

University Graduate Association College (https://www2.hkugac.edu.hk/en_us/), was among the first secondary schools that launched online lessons. During the school suspension period, there were four to seven lessons on Zoom every day, each lasting 35 minutes. Almost all subjects including physical and musical education were taught via the Internet. At the Tak Oi Secondary School (<https://www.takoi.edu.hk/>) up to 250 people could join an online class at the same time. (<https://asiatimes.com/2020/02/online-learning-flourishes-in-hk-macau-amid-virus/>)

Especially free tools are in demand. Currently Zoom (<https://www.zoom.us/>) allows up to 100 people to meet online for up to 40 minutes free. A user is charged a monthly fee of EUR 19 to hold a long meeting with 300 participants. Skype (<https://www.skype.com/en/>), has a call duration limit of 110 minutes and is free of charge for online meetings with up to 20 people. Skype for Business (<https://www.skype.com/en/business/>), which costs EUR 1.9 per user each month, allows a user to add up to 250 people to online meetings. Google Hangouts Meet (<http://gsuite.google.com/>) also supports video conferencing with up to 250 people with an Enterprise package that costs EUR 23 per month. Microsoft Teams is also getting more popular. (<https://products.office.com/en-US/microsoft-teams/group-chat-software>) The increased IT needs and necessary internet connection poses financial challenges to poorer parents.

1.1.6 China

Studying abroad

Nowadays, more and more Chinese students are interested in studying abroad. Numerous scholarships are offered in China and abroad which help students to save tuition fees and living costs. As China's economy has been booming, more families can afford to send their children abroad. Education consultants are able to recruit students from major cities as well as smaller second-tier cities. Usually richer parents are very interested in sending their children abroad to study but they often lack of the appropriate information.

In Germany, students from China are already the second largest group of foreign students (10%) after those from Turkey. In Austria Chinese students only represent 1% of all international students. In recent years, Chinese students went to Europe, North America and Australia to study economics or technical related subjects. Lately they are also interested in other subjects like humanities and Austrian institutions have been successfully in recruiting Chinese students to pursue such programs.

There are more than 60 joint degree programs between the U.S. and Chinese Universities and they are very popular. Students are able to study at two different institutions for two years each. Some European Universities are also following this model and are developing international partnerships and joint courses with Chinese institutions.

It is very popular for Chinese to learn western language apart from English. German is one of the most popular third foreign language after Japanese and French. While in Germany, Austria and Switzerland numerous educational institutions offer German courses especially for Chinese, some German language schools have also established themselves in mainland China and Hong Kong. Summer camps and other language trips without a degree are also gaining popularity.

Primary and secondary school pupils form the largest group interested in attending language schools abroad. However, there are often disputes and misunderstanding between parents and study organizers, sometimes also caused by the limited western language skills the Chinese parents themselves possess. Their expectations are also often too high, sometime fostered by education agents getting a fee from the international school to recruit a student. They expect their children to travel abroad smoothly, live in nice accommodation, and have decent food provided and teachers to take very good care of the students. Parents usually over expect the results of short-term study program.

Chinese students require a visa for studying abroad, including in Austria. If the guidelines for obtaining a visa for a destination are too strict or cumbersome, the motivation of Chinese students to select that country decreases. The process must be straightforward and as fast as possible and parents expect support from the international school when applying for a visa.

English is taught at all Chinese schools but results vary. Also there is a big focus on reading in language teaching and oral skills often lag behind. Internationally recognized tests such as IELTS or the TOEFL allow Chinese to demonstrate their English standard to the education institution. These certificates usually make applying a visa easier, especially in English-speaking countries.

E-learning

Online education tools have been a natural progression for China, as over 800 million Chinese citizens are internet users, with impressive fiber, broadband, and internet coverage even in many remote regions. STEAM education (science, technology, engineering, art, mathematics) constitutes, along with K-12 education, the largest segments of China's EdTech market, which in 2018 reached USD 300 billion in revenues.

During COVID-19, some online teaching companies offered their services for free. For example, TAL Education (<http://en.100tal.com/>) announced on its official Weibo account free live-streaming courses for all grades to "minimise the influence on study due to the outbreak" while VIPKID (<https://www.vipkid.com.cn/>), which specialises in teaching English online, said on Weibo it would offer 1.5 million free online courses to children aged from four to twelve.

Many Chinese schools also use e-learning. Even courses in creative arts, music, drama and physical education (including swimming!) are conducted online. Most popular software used in mainland schools are Zoom (<https://zoom.us/>), Tencent Meeting (<https://meeting.tencent.com/>) and DingDing (<https://www.dingtalk.com/>).

2 OPPORTUNITIES FOR AUSTRIAN EDUCATION PROVIDERS

2.1 General

The education sectors in Hong Kong and mainland China are promising markets for Austrian institutions and companies. Private Austrian universities, schools and education providers could recruit paying students to study in Austria or to pursue short stay program. Universities and Schools in Hong Kong and China are interested in mutually beneficial exchange programs with Austria or to recruit teachers. Public and private Schools are looking to apply the best tools and teaching materials available and to apply edu-tech. English as one Hong Kong's official languages makes Hong Kong a good start for building up contacts in Asia.

Recruiters in Asia recognize the experience students gained from student exchange program, joint research projects, training courses, continuing vocational training courses and summer.

In the publication "Code of Practice for Non-local courses" (<https://www.edb.gov.hk/en/edu-system/postsecondary/non-local-higher-professional-edu/index.html>), the Education Bureau provides recommendation on the establishment of a cooperation relationship between a Hong Kong educational institution and an international education provider. The Bureau suggests:

- a) The financial rights and obligations of the partner institutions are regulated;
- b) Local partners have been carefully selected in terms of qualitative and ideological aspects;
- c) Both parties should aware of the structure of program (mode, duration and access restrictions);
- d) Possibility of joint cooperation, joint staffing, teaching methods and student support.
- e) Administrative areas such as the provision of information and access to university facilities.
- f) Both parties should strive to monitor teaching quality and the pursuit of quality improvement.

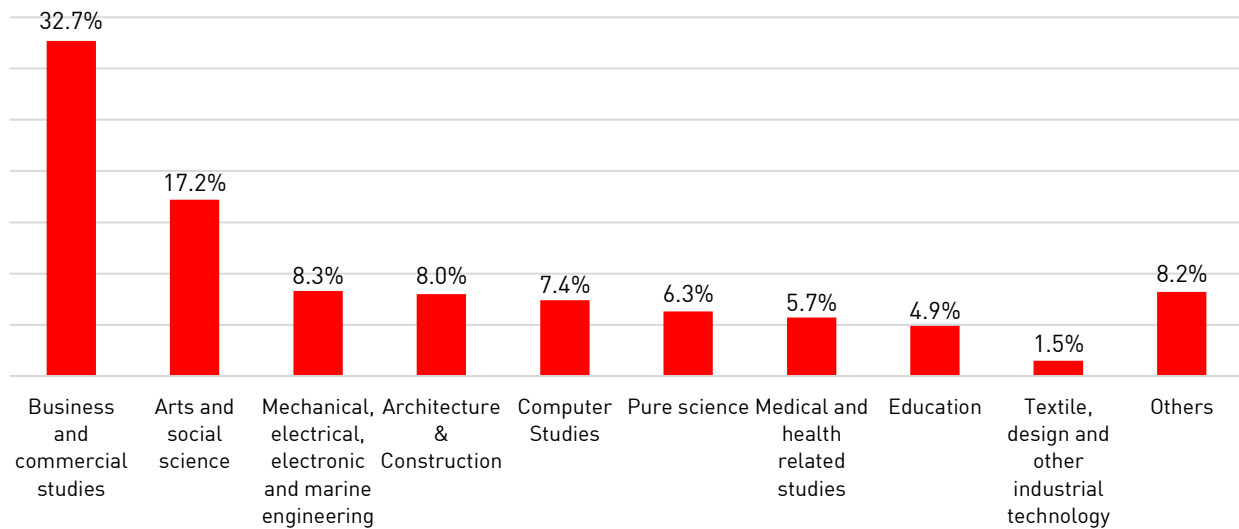
2.2 Attract Students to Study in Austria

Student Exchange

Universities in Hong Kong are increasingly looking for overseas partnerships to promote exchange programs, academic exchanges, and research collaboration. English-language teaching programs abroad are particularly in demand. Many parents and universities strive for at least one part of the studies to be completed abroad. In 2017 12.4% of all students from Hong Kong studied abroad, this high "Outbound Mobility Ratio" puts Hong Kong at the forefront of Asia countries. (<https://tradingeconomics.com/hong-kong/outbound-mobility-ratio-all-regions-both-sexes-percent-wb-data.html>)

In Hong Kong, post-secondary school students are particularly interested in business and commercial studies. In colleges and in education after compulsory schooling (age 16 years and older), the areas of hotel, catering, tourism management, sports science, business management are very popular. There is also a great demand in the arts and social science sector.

Field of Education of Post Secondary Education (2016)



Source: Population By-census 2016 (<https://www.byccensus2016.gov.hk/data/16bc-main-results.pdf>)

German course

Learning German is getting more popular. German schools and language schools are an attractive option. The German Swiss International School (<https://www.gsis.edu.hk/>) charges primary school fees of EUR 19,200 per year and secondary school fees of EUR 24,000 per year. Its IB exam results in 2019 was an average 39.9/45 score which makes it one of the best in Hong Kong.

The Goethe-Institut (<https://www.goethe.de/ins/cn/en/sta/hon.html>) is a German language school with 50 years history. They offer German courses for kids, teens and adults. They also offer German examination preparation course.

The University of Hong Kong offers a B.A. Major in German (<https://german.hku.hk/>). The course in German provides students with a comprehensive knowledge of both spoken and written German. In addition to the acquisition of these linguistic skills, students are introduced to a wide range of aspects of contemporary German society and culture through the study of numerous multimedia materials and documents. All German Major Students are encouraged to attend an intensive summer language course of about 4 weeks duration at a university in Germany during the summer between their 2nd and 3rd year and successful completion of such a course at the appropriate level will count as 6 credits towards their major requirements.

The Hong Kong Baptist University offers BSocSc (Hons) in their European Studies (German Stream) program (<http://europe.hkbu.edu.hk/germanstream/>). European Studies is a four-year program within the Department of Government and International Studies. The aim is to give students a firm knowledge of the basic features of the European world through a combination of political, historical, social, linguistic and business-oriented studies, together with the experience of living and working in Europe itself. As part of the Major in European Studies, students must choose to learn either French or German. During the first two years, students are trained to a level of fluency which allows them to study, work and live in a French- or German-speaking environment. The students will spend the third year of the program fully in Europe. It consists of academic study at a German-speaking university and, when feasible, a placement with an European companies or public institutions.

2.2.1 Success Factors

Cultural Understanding

The Hong Kong market is appealing as the education system is similar to that of the U.K., and English is one of Hong Kong' languages. In mainland China the possibilities of communicating in English are sometimes limited. School and Business Culture between Austria, Hong Kong and China differ a lot.

Being flexible and open-minded and accepting cultural differences are essential prerequisites for a successful market entrance. New Austrian suppliers need to understand the local conditions and have to adjust their products and services to the needs of Asians schools and students.

Local Point of Contact

In order to recruit students to study in Austria, Austrian institutions should consider establishing a local contact. Teachers, Parents and students would prefer to meet a representative at local event like education fairs and local briefings. One of the possibilities is to cooperate with specialized consultants or education agents, which already have well-established contacts and know the local markets.

2.3 Decisive Factors or Opportunities

Many Chinese parents would like to send their children abroad at an early age. They are interested in programs that provide a "full package". Best would be if the school could also offer an accommodation / food package and have designated contact person for students and concerned parents. Chinese parents are usually willing to spend a large sum of EUR 40,000 or more per school year.

Usually the most important criteria for Chinese to choose a University is the reputation. Smaller education institutions must first attract attention through strategic recruitment. The most important channel is attending education fairs in Hong Kong and China. At those education fairs, young people will come together to find out possible options for further education. The "China Education Expo" (<https://www.chinaeducationexpo.com/english/>) and "China International Education Exhibition Tour" (<http://www.cieet.com/>) are probably the most famous educational fairs in Asia and takes place several times a year in all major cities in China.

Some institutions choose to partner up with local universities or overseas education center to recruit new students. The China government requires license for education agents. For Hong Kong, the Hong Kong Trade Development Council (<https://www.hktdc.com/>) is a good contact for Austrian education institutions to seek assistance in finding local authorized agents. Some agencies will provide detailed information about foreign institutions, help future students in the application preparations, visa application, and provide accommodation assistance.

When Hong Kong or mainland Chinese students choose where to continue their studies, they will usually ask the following questions and expect foreign institute to provide some information.

- Any advantage of studying in Austria rather than in English speaking countries?
- Are the programs offered in English?
- Total cost including tuition, accommodation and other daily expenses (estimate)
- Is the city safe? Any security concern?
- Any scholarships?
- Is the program recognized by the Chinese Ministry of Education?
- What is the admission entrance requirements, IELTS needed?
- What is the application procedure?

- Are there any accommodation arrangement or buddy programs for newcomers?
- Visa application
- Future career prospects?

Apart from the above, many Chinese students and parents also expect to get assistance from the Austrian institutions for:

- Apply for residence permit and visa
- Arrangement of student dormitory or host family in Austria
- Pre-departure briefing
- Airport pick-up
- Official registration (Meldezettel)
- Get an Austrian mobile SIM card
- Apply for student semester ticket
- Open an Austrian bank account
- Accompany to immigration office to pick up residence permit

2.4 Assistance Provided by AUSSENWIRTSCHAFT AUSTRIA

If Austrian institutions or companies are interested in providing products and services for the education sector in mainland China or Hong Kong or to recruit students from that area, AußenwirtschaftsCenter Hongkong can assist with a range of services like:

- Introduce local education consulting agencies
- Promotion in web pages, brochures
https://www.advantageaustria.org/cn/events/Study_in_Austria_Programmes.pdf or local newspapers
- Attend and present at education fairs and promote on behalf of Austrian provider
- Participate or give seminars
- Connect to local high school counsellors/targeted partner and address lists
- Promote in social media and online forums (e.g. Facebook, blogs, WeChat and Weibo etc)

Some of the education events attended by or organized by AußenwirtschaftsCenter Hongkong:

- Education & Careers Expo (once a year) in mainland China
- Austrian Education Showcase (Shanghai or Beijing + Hong Kong + Macau in October)
- Attend University information fairs organized by local secondary schools
- Promote Study-in-Austria on social media (i.e. Facebook and WeChat etc)
- Bi-weekly posting of Chinese articles on Austrian education at a local education website Ohpama (<http://www.ohpama.com/specialists/monica-ng/>)
- Organize info-seminar
- Organize pre-departure briefing for students before their departure to Austria

Have a look at our dedicated social media accounts on facebook and wechat:

Study in Austria / Facebook account:



<https://www.facebook.com/educationinaustria>

留學奧地利

Study in Austria / WeChat Account:



Please scan in WeChat ID: STUDY_IN_AUSTRIA

留學奧地利

3 APPENDIX

3.1 Education Institutions from Other Countries

Hong Kong parents are willing to pay high school fees to foreign education institutions because of the higher education standard and Hong Kong people have relatively high purchasing power. Universities from the U.S., the U.K., Canada and Australia are particularly attractive to Hong Kong students. For Europe, most popular countries are the U.K., France and Germany. Some have also established a branch in Hong Kong. The University of Chicago (<https://www.uchicago.hk/>) has established a branch in Hong Kong and had moved their Asian headquarters from Singapore to Hong Kong.

The U.K.

The U.K. is the most important player in terms of educational cooperation because of its common past with Hong Kong. The education system in Hong Kong was built based on the U.K., and even after the formal end of colonial rule, relations on education were remained. The British Council (<https://www.britishcouncil.hk/en>) is the local contact for universities and students and organizes its own educational "Study UK Fair" (<https://www.britishcouncil.hk/en/events/study-uk-fair-2020>) twice a year, each with over 100 exhibitors. The number of applications from Hong Kong and China to UK universities rose from more than 17,000 in 2018 to 21,000 in 2019. The British Council also offers different English courses for students from 18 months old to adults.

France

France is able to position itself well in Hong Kong's education market. French institutions are highly recognized by Hongkongers. In 1963 the French International School (<https://www.fis.edu.hk/en>) was founded and more than 2,500 students are currently enrolled. The school has a strong focus on languages and its students are accepted to top universities around the world. In addition, various scholarships and funding are offered to make studying in France more attractive. A successful cooperation is the Executive MBA Global Fashion Management Program, a course organized in partnership between Institut Français de la Mode, Fashion Institute of Technology in New York and the Hong Kong Polytechnic University in Hong Kong.

Located at the Consulate General of France in Hong Kong, the CampusFrance Hong Kong (<http://www.hongkong.campusfrance.org/en/>), offers a range of complimentary services to help prepare for studying in France. CampusFrance in Hong Kong promotes French Higher Education in Hong Kong and in Macau. It provides practical information about France, higher education system and programs offer as well as scholarships information, studying and living tips in France etc.

Founded in 1953, the Alliance Française de Hong Kong (AFHK) (<https://www.afhongkong.org/en/>) is a Hong Kong not-for-profit association dedicated to the promotion of the French language and culture. They offer French courses for children and adults, help with examination preparation, and provide assistant for those who would like to study in France or Quebec in Canada.

Germany

German-Swiss families who were looking for a bilingual German-English education in an international setting established the German-Swiss International School (<https://www.gsis.edu.hk/>) in 1969. Different German universities have partnerships with Hong Kong universities. The German Academic Exchange Service (<https://www.daad.de/en/>) has established a few centers in China (including in Beijing, Guangzhou and Shanghai) to provide information and complimentary consultation services for studying in Germany.

Goethe-Institut Hong Kong's (<https://www.goethe.de/ins/cn/en/sta/hon.html>) main goal is to promote international cultural cooperation by organizing a broad variety of events to present German culture abroad. They offer German course to kids from 5 years old and also for adults. They also promote German culture by organizing different events and provide assistance for German exam preparation. They often partner up with the Austrian Consulate General or Austrian institutions for Austrian programs.

3.2 Partnerships between Hong Kong and Austrian Institutions

Hong Kong institutions	Austria institutions
University of Hong Kong	Academy of Fine Arts Vienna University of Applied Sciences Upper Austria University of Innsbruck University of Salzburg University of Vienna Vienna University of Economics and Business
The Chinese University of Hong Kong	Graz University of Technology University of Graz University of Vienna Vienna University of Economics and Business
The Hong Kong University of Science and Technology	University of Innsbruck Vienna University of Economics and Business
The Hong Kong Polytechnic University	Management Center Innsbruck Modul University Vienna Salzburg University of Applied Sciences University of Applied Sciences IMC Krems University of Veterinary Medicine, Vienna Vienna University of Economics and Business
City University of Hong Kong	University of Vienna
Hong Kong Baptist University	MCI Management Centre Innsbruck University of Graz University of Klagenfurt University of Applied Sciences Upper Austria
Lingnan University	University of Applied Sciences Kufstein Tirol University of Applied Sciences IMC Krems
The Education University of Hong Kong	Pädagogischen Hochschule Tirol Private Pädagogische Hochschule der Diözese Linz

3.3 Useful Contacts

AußenwirtschaftsCenter Hongkong

Ms Monica Ng, Ms Yvonne Choi
 T. +852 2522 2388
 E. hongkong@wko.at
 W. <http://www.wko.at/aussenwirtschaft/cn>

AUSSENWIRTSCHAFT Service

T. +43 5 90 900 5134
 E. aussenwirtschaft.service-export@wko.at
 W. <https://www.wko.at/aussenwirtschaft/bildung/>

OeAD (Österreichische Austauschdienst) GmbH

Alexandra Wagner
 OeAD-Kooperationsbüro Shanghai
 T. +86 21 6564 2112
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 W. <https://www.oead.at/>

Eurasia-Pacific UNINET

T. +43 1 250 77-4209
 E. eurasiapacific@vetmeduni.ac.at
 W. <http://www.eurasiapacific.net>

DAAD Information Centre Guangzhou

Mr. Dominik Gerland, Director
 Sun Yat Sen University Guangzhou (School of Foreign Languages - German Department)
 Room 601, Guangzhou 510275, China
 T. +86 20 8411 3213 / +86 20 8411 3214
 E. guangzhou@daad.org.cn
 W. <https://www.daad.org.cn/>

British Council

3 Supreme Court Road, Admiralty, Hong Kong
 T. +852 2913 5100
 E. educationuk@britishcouncil.org.hk
 W. <https://www.britishcouncil.hk/en>

Consulate General of France in Hong Kong & Macau

25/F & 26/F, Tower II, Admiralty Centre, 18 Harcourt Road, Hong Kong
 T. +852 3752 9974 / +852 3752 9900
 E. campusfrance@consulfrance-hongkong.org
 W. <https://hongkong.consulfrance.org/-English->

Campus France

25/F, Tower II, Admiralty Centre, 18, Harcourt Road, Central, Hong Kong
 E. campusfrance@consulfrance-hongkong.org
 W. <http://www.hongkong.campusfrance.org/en>

Contacts of Tertiary Education Institutions in Hong Kong

University Grants Committee-Funded Universities:

City University of Hong Kong

Tat Chee Avenue, Kowloon, Hong Kong
 Ms Judy HUI, Manager
 T. +852 3442 7127 (Judy) / +852 3442 7654
 E. judy.hui@cityu.edu.hk / cpro@cityu.edu.hk
 W. <https://www.cityu.edu.hk/>

Hong Kong Baptist University

Kowloon Tong, Kowloon, Hong Kong
 Ms Yvonne LEE, Director, International Office
 T. +852 3411 2187 (Yvonne) / +852 3411 7400
 E. yvonnelee@hkbu.edu.hk / exchange@hkbu.edu.hk
 W. <https://www.hkbu.edu.hk/eng/main/index.jsp>

Lingnan University

8 Castle Peak Road, Tuen Mun, New Territories, Hong Kong
 Ms Joanne LAI, Director, Office of Global Education and Interdisciplinary Studies
 T. +852 2616 8990 (Joanne) / +852 2616 8888
 E. omip@LN.edu.hk / exchange@LN.edu.hk
 W. <https://www.ln.edu.hk/>

The Chinese University of Hong Kong

Shatin, New Territories, Hong Kong
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 T. +852 3943 7586 (Shally) / +852 3943 7000 / +852 3943 6000
 E. shallyfan@cuhk.edu.hk / iasp@cuhk.edu.hk
 W. <https://www.cuhk.edu.hk/chinese/index.html>

The Education University of Hong Kong

10 Lo Ping Road, Tai Po, New Territories, Hong Kong
 Ms Ada CHAU, Manager, Global Affairs Office
 T. +852 2948 7286 (Ada) / +852 2948 8888
 E. adachau@eduhk.hk / gao@eduhk.hk
 W. <https://www.eduhk.hk/main/>

The Hong Kong Polytechnic University

Hung Hom, Kowloon, Hong Kong
 T. +852 2766 5111
 E. polyu.international@polyu.edu.hk
 W. <https://www.polyu.edu.hk/en/>

The Hong Kong University of Science and Technology

Clear Water Bay, Kowloon, Hong Kong
 Ms Lesley CHAN, Manager, Office of Global Learning
 T. +852 2358 8178 (Lesley) / +852 2358 6000
 E. study.abroad@ust.hk / pao@ust.hk
 W. <https://www.ust.hk/home>

The University of Hong Kong

Pokfulam, Hong Kong

Ms Carmen YUEN, Programme Manager, International Affairs Office

T. +852 2859 2111

E. goabroad@hku.hk / global@hku.hkW. <https://www.hku.hk/>***Publicly-Funded Institution*****The Hong Kong Academy for Performing Arts**

1 Gloucester Road, Wanchai, Hong Kong

T. +852 2584 8500

E. aso.admission@hkapa.eduW. <https://www.hkapa.edu/>***Self-Financed Institutes*****Caritas Institute of Higher Education**

2 Chui Ling Lane, Tseung Kwan O, New Territories, Hong Kong

T. +852 3653 6600/+852 2521 4693

E. info@cihe.edu.hkW. <https://www.cihe.edu.hk/en/home/index.html>**Centennial College**

3 Wah Lam Path, Pokfulam, Hong Kong

T. +852 3762 6200

E. international@centennialcollege.hku.hkW. <https://www.centennialcollege.hku.hk/>**Chu Hai College of Higher Education**

80 Castle Peak Road, Castle Peak Bay, Tuen Mun, N.T. Hong Kong.

T. +852 2408 9928

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5 Wai Chi Street, Shek Kip Mei, Kowloon, Hong Kong

T. +852 5804 4140

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T. +852 2926 1222

E. enquiry@hkct.edu.hkW. <https://www.hkct.edu.hk/en>**Hong Kong Nang Yan College of Higher Education**

325-329 Lai Chi Kok Road, Sham Shui Po, Kowloon, Hong Kong

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E. registry@ny.edu.hkW. <http://www.ny.edu.hk/web/eng/home.html>**Hong Kong Shue Yan University**

10 Wai Tsui Crescent, Braemar Hill, North Point, Hong Kong

T. +852 2570 7110

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Technological and Higher Education Institute of Hong Kong, Vocational Training Council

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Hang Shin Link, Siu Lek Yuen, Shatin, N.T., Hong Kong

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E. info@ouhk.edu.hkW. www.ouhk.edu.hk**Tung Wah College**

31 Wylie Road, Homantin, Kowloon, Hong Kong

T. +852 3190 6600

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FW 402, 4/F, Festival Walk Tower, 0 Tat Chee Avenue, Kowloon Tong, Hong Kong

T. +852 3442 9880

E. college.office@cityu.edu.hkW. <https://www.cccu.edu.hk/home.html>**Yew Chung College of Early Childhood Education**

2 Tin Wan Hill Road, Tin Wan, Aberdeen, Hong Kong

T. +852 3977 9877

E. enquiry@yccece.edu.hkW. <https://www.yccece.edu.hk/en/>**Contacts of Tertiary Education Institutions in Macau****University of Macau**

Av. Padre Tomás Pereira, Taipa, Macau

T. +853 2883 1622

E. info@um.edu.moW. <https://www.um.edu.mo/>**Macau University of Science and Technology**

Avenida Wai Long, Taipa, Macau

T. +853 2888 1122

E. itsc@must.edu.moW. <https://www.must.edu.mo/>**City University of Macau**

Av. do Dr. Rodrigo Rodrigues, Ed. Royal Centre, 3 Andar, Macau

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University of Saint Joseph

Rua de Londres 16 (NAPE), Macau, China
 T. +853 8796 4400
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 W. <https://www.usj.edu.mo/en/>

Macao Polytechnic Institute

Rua de Luís Gonzaga Gomes, Macau
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 W. <http://www.ipm.edu.mo/en/index.php>

Institute for Tourism Studies

Colina de Mong-Ha, Macau
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 W. <https://www.ift.edu.mo/>

Kiang Wu Nursing College of Macau

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 E. admin@kwnc.edu.mo
 W. http://www2.kwnc.edu.mo/?page_id=5481

Macao Management Association

Rua de Xangai 175, Edif. ACM, 9 andar, Macau
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 E. mma@macau.ctm.net
 W. <https://www.mma.org.mo/en/>

Macao Millennium College

Alameda Dr. Carlos d'Assumpção No. 255, China Civil Plaza 8- Andar, Macau
 T. +853 2878 8186
 E. info@mmc.edu.mo
 W. <http://www.mmc.edu.mo/>

Academy of Public Security Forces

Calçada do Quartel, , Coloane, Macau
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 E. esfsm-info@fsm.gov.mo
 W. <http://www.fsm.gov.mo/ESFSM/>

3.4 Government Departments

HKSAR Census and Statistics Department: <http://www.censtatd.gov.hk>

Education Bureau: <http://www.edb.gov.hk/index.aspx?nodeID=92&langno=1>

Macau Education and Youth Affairs Bureau
https://portal.dsej.gov.mo/webdsejspace/internet/Inter_main_page.jsp

Chinese Ministry of Education <http://en.moe.gov.cn/>

3.5 Education Fairs

China Education Expo

<http://www.chinaeducationexpo.com/english/>

China International Education Exhibition Tour

<http://www.cieet.com/>

HKTDC Education & Careers Expo

<http://m.hktdc.com/fair/hkeducationexpo-en/HKTDC-Education-and-Careers-Expo.html>

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