



THE PARTHENON GROUP

Public-Private Partnerships in Emerging Markets

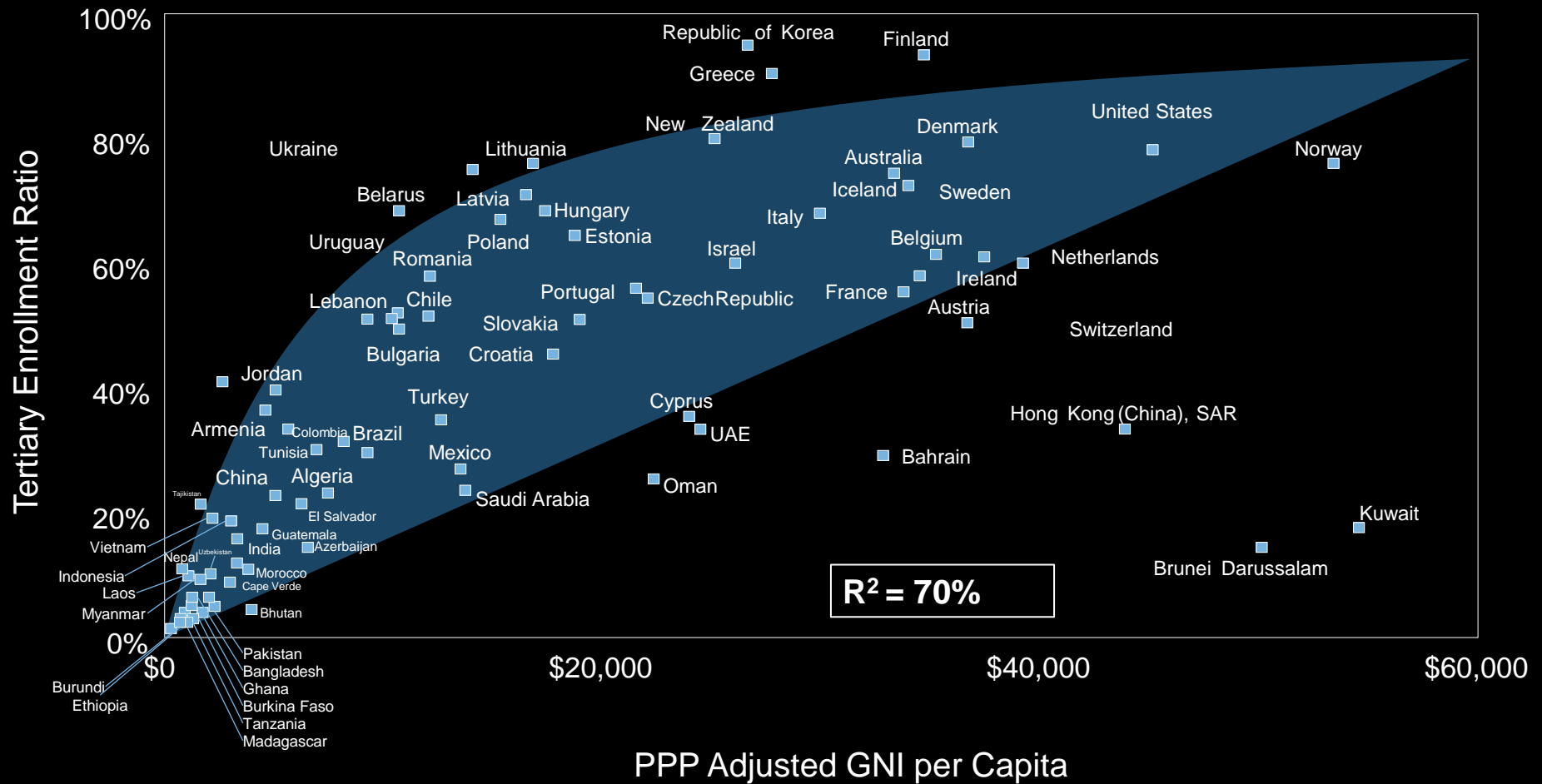
Prepared by Parthenon for OBHE's Future of PPP in Higher Education

London, December 2014

Parthenon's Education Practice completes more than 150 projects a year in over 80 countries

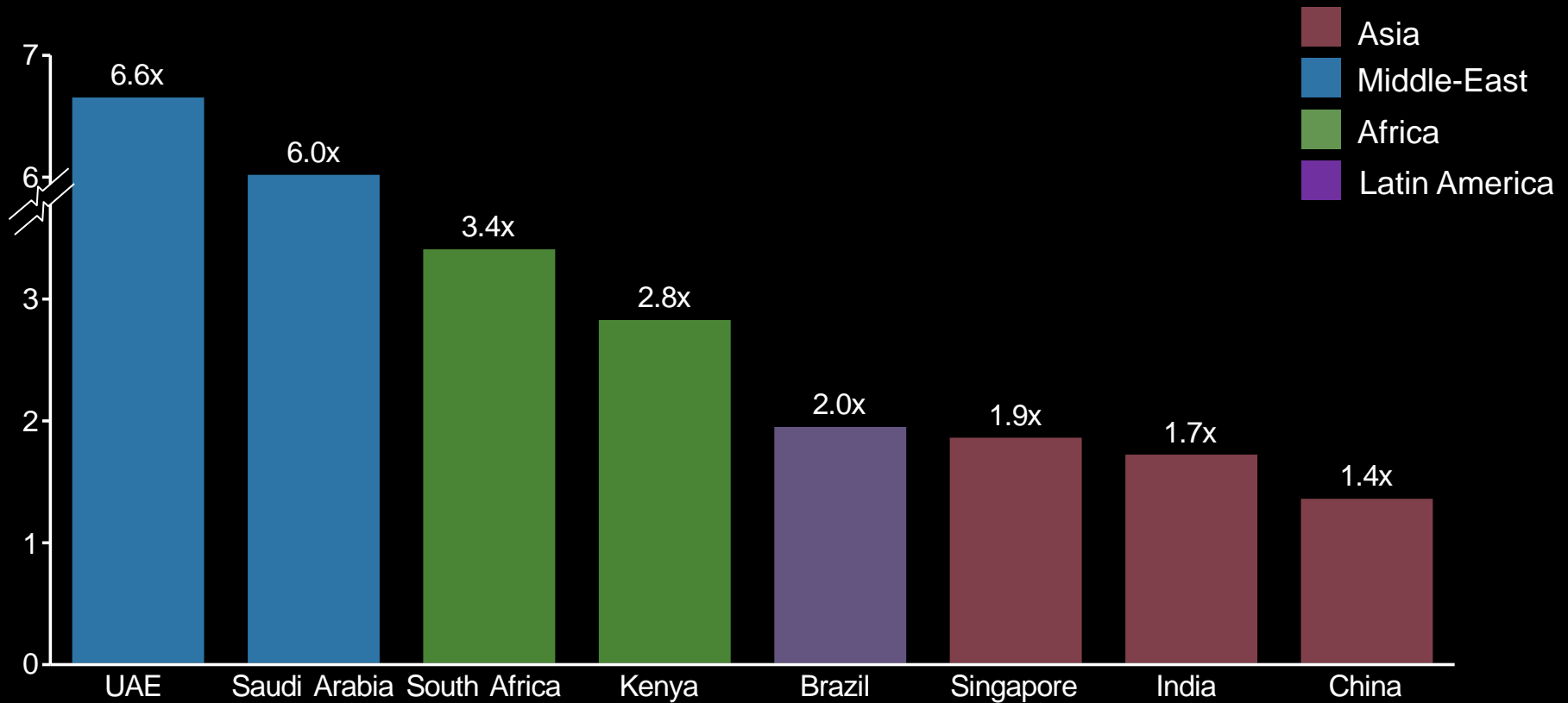


Economic growth is directly linked to tertiary education enrolments



Private higher education is growing faster than real GDP across emerging markets

Private Higher Education Spend vs Real GDP Growth, (2009-12)



Public-Private Partnerships in Emerging Markets

Government-
Sponsored
Private Branch
Campuses

Private Agencies
and Public
Universities

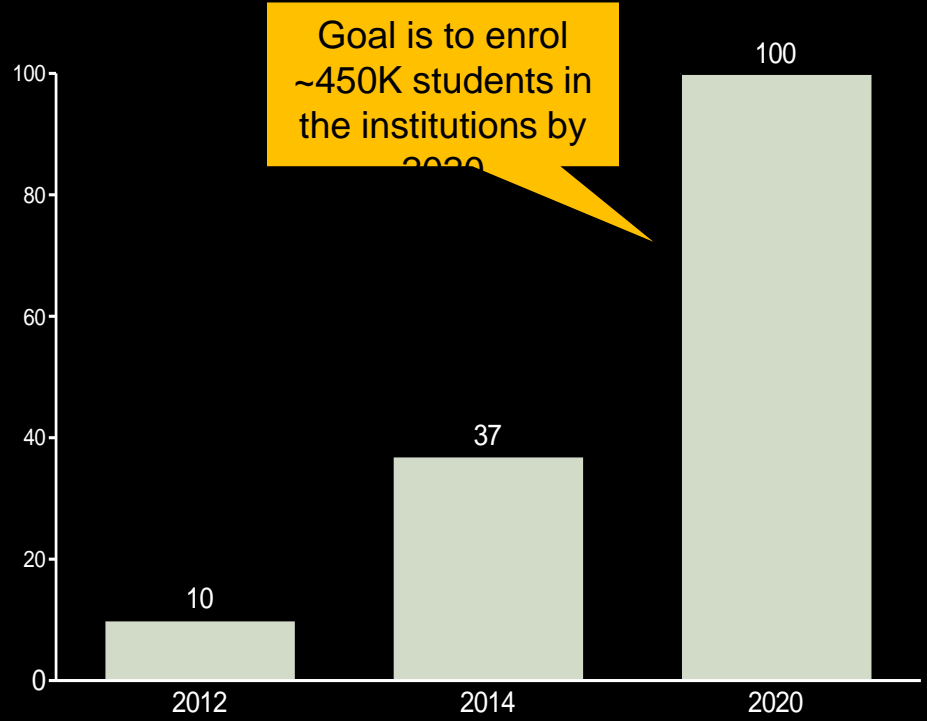
Public Universities
Setting Up Private
Corporations



Internationalization encourages partnerships between public and private sector

The Saudi government is awarding contracts to global private providers through the Colleges of Excellence program

Number of Saudi Colleges of Excellence, 2012-2020F



Select Private Providers Awarded Contracts



NYU is the highest ranked institution to have a full-scale branch campus in the GCC

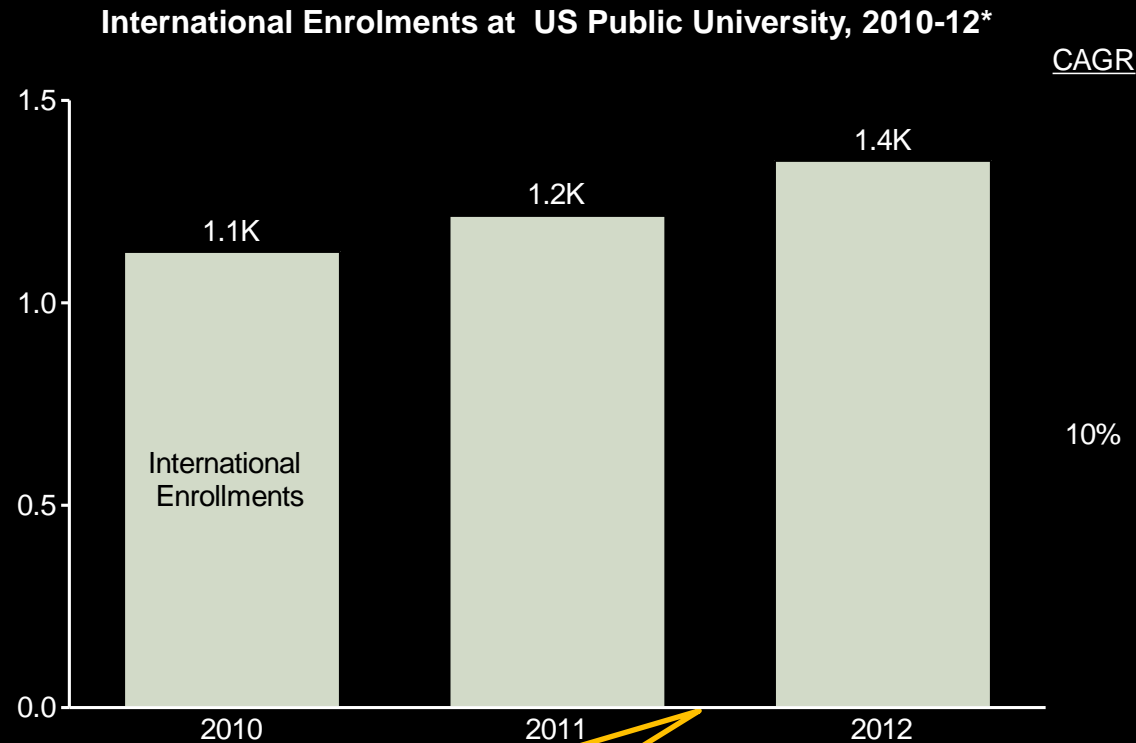


- The region's first comprehensive liberal arts college operated by an American university
- Competitive admissions standards (13% acceptance rate)
- Aims to enroll world's top 1-2% of students
- Instruction in English

2014 QS World University Rankings,
NYUAD vs other GCC Universities

Institution Name	Location	Type	2014 QS Ranking
NYU	Abu Dhabi, UAE	Branch Campus	41
Carnegie Mellon	Doha, Qatar	Branch Campus	65
Texas A&M	Doha, Qatar	Branch Campus	165
King Fahd University	Dhahran, Saudi Arabia	Main University	225
Paris Sorbonne	Abu Dhabi, UAE	Branch Campus	227
King Saud University	Riyadh, Saudi Arabia	Main University	249
King Abdul Aziz University	Jeddah, Saudi Arabia	Main University	344
UAE University	Al Ain, UAE	Main University	385
AUS	Sharjah, UAE	Main University	390




INTO, a private provider of recruitment services, has successfully increased international enrolments for public universities



Critical Success Factors for INTO

- **In-Country Marketing Penetration:** INTO has 70+ marketing staff in 20 country markets
- **Outsourced** International Admissions
- **Lower Acceptance Criteria** for Pathway Programs

Many public universities partner with private providers or create their own private institutes when setting up abroad

	Location	Structure
 Curtin University	Malaysia	Partnered with Government to Set up Private Branch Campus
 MURDOCH UNIVERSITY PERTH, WESTERN AUSTRALIA	Singapore	Degrees offered through Private Partners
 UNIVERSITY OF WOLLONGONG	Dubai	Incorporated Private Company Runs Branch Campus

Thank You



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