

VENTURE EDUCATION:



# British Independent Schools in China

问创  
教育 在华英国私立学校

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## Table of Contents | 目录

- Market Summary | 市场综述
- What's causing the 2nd Wave of British Schools? | 英国私立学校第二次办学浪潮出现的原因有哪些？
- Map of British private schools across China | 中国各地的英国私立学校信息图表
- Map of British private schools due to open in 2019 | 将在2019年投入使用的英国私立学校信息图表
- List of British private schools in China | 在华英国私立学校名单

# Market Summary 市场综述

The international school market in China has gone from strength to strength and 2018 alone saw the opening of 87 new international schools across the country, bringing the total to 821. Among these schools, the British curriculum is the most commonly used, with 40% of schools offering an A-Level curriculum, ahead of the USA's AP (26%) and the International Baccalaureate (15%). Furthermore, as the popularity of international curriculums among Chinese parents continues to grow, the percentage of international schools that admit Chinese nationals has reached record numbers. Private schools that admit Chinese nationals made up more than half of all international schools for the first time in 2018 at 52%, compared to private schools open to foreign nationals only (15%) and international departments in public schools (33%)<sup>1</sup>.

In the pages below, we have compiled a list of all the British independent school branches is expected to have opened or are due to open in China. The report specifically looks at British independent schools as opposed to all schools with British curriculums.

中国的国际学校市场正在不断壮大，仅2018年就新增了87所国际学校，总数达到了821所。在这些学校中，英国课程最受欢迎，提供A-Level课程的学校占40%，比例高于美国的AP（26%）课程和国际文凭课程（15%）。此外，随着中国父母对于国际课程的认可，国际学校接收中国公民的比例达到了创纪录的水平。与仅向外籍公民开放的私立学校（15%）和公立学校中设立的国际部（33%）相比，在2018年私立学校的数量首次占到国际学校总数的一半以上，达到52%。

在以下篇幅当中，我们精心编制了一份已在中国投入使用或即将运营的所有英国私立学校分校的名单。本报告专门关注的对象是英国私立学校，而非所有使用英国课程的学校。

<sup>1</sup> 新学说：2018中国国际学校最新数据 <https://www.jiemodui.com/N/103039.html>

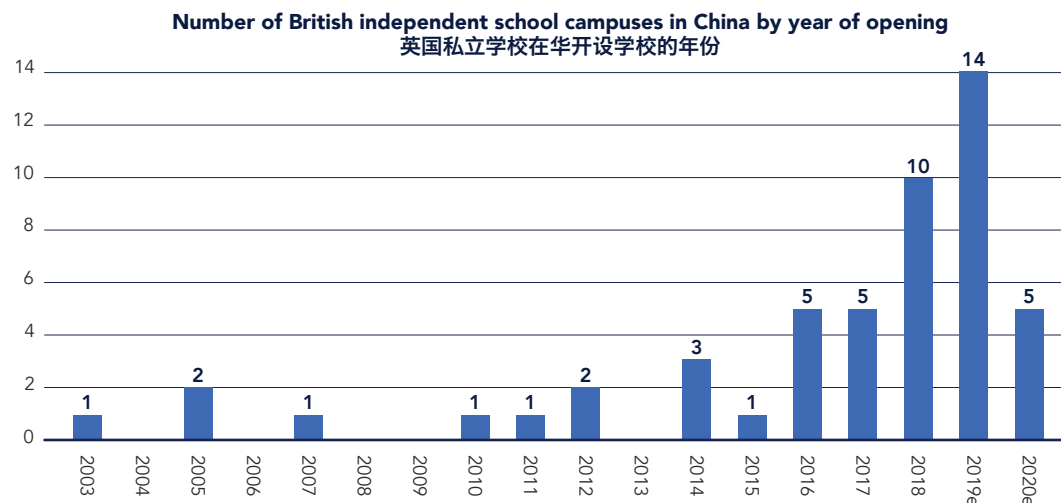
## THREE TRENDS 三大趋势

1

### A surge in British independent school campuses 英国私立学校数目激增

At the end of 2017, there were 22 British independent school campuses operating in China. This number is expected to have more than doubled by the end of 2019, with ten new campuses opening in 2018 and a further 14 openings planned in 2019.

截至2017年底，中国有22所英国私立学校。到2019年底，这个数字还将增加一倍以上，2018年将有10所新学校开始运营招生，另外还有14所新学校计划于2019年招生。



N.B. Chart does not include schools with an unconfirmed opening date.  
注：图表不包括未确认开放日期或地点的学校



The number of British independent school campuses in China will  
**increase by 44% in 2019.**

2019年在华的英国私立学校数量将增加**44 %**。

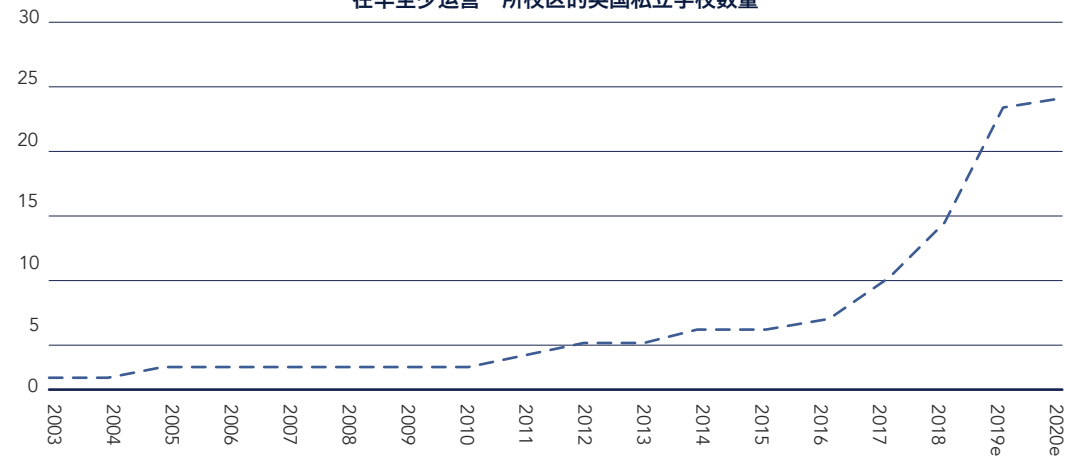
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## A growing diversity of brands 学校品牌日趋多样化

Prior to 2018, ten different British independent schools were running international campuses in China. However, 2018 saw a record five schools open their first international campus in China. An additional nine will do the same in 2019.

2018年之前，10所不同的英国私立学校在中国开设了国际学校。不过到了2018年创纪录地出现了5家新学校开设了他们在中国的第一所国际学校，还有另外9所学校将于2019年在华开设他们的首家国际学校。

Number of British independent schools operating at least one campus in China  
在华至少运营一所校区的英国私立学校数量



N.B. Chart does not include schools with an unconfirmed opening date.  
注：图表不包括未确认开放日期或地点的学校

The number of British independent school brands is expected to **increase by 64% in 2019.**

英国私立学校的品牌数量预计在2019年将增加**64%**。

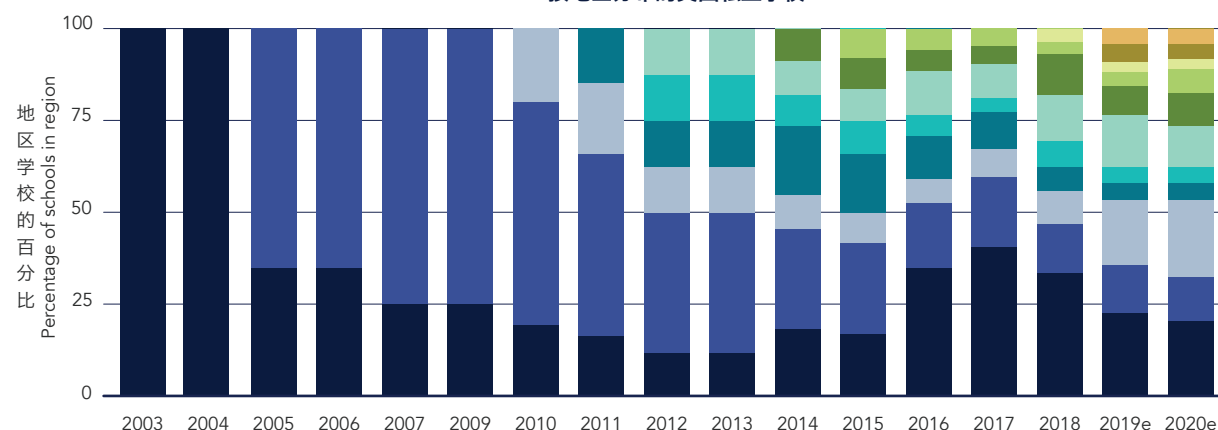
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## A growing diversity of cities 城市的日趋多样化

International schools are no longer the preserve of Shanghai and Beijing. In 2018, Shenzhen, Fuzhou, Xuzhou and Wuxi all saw their first British independent school campuses as will the cities of Nanjing, Guangzhou, Chongqing, Hefei and Foshan in 2019.

国际学校不再是上海和北京的专利。2018年，深圳、福州、徐州和无锡都开设了首家英国私立学校，在2019年南京、广州、重庆、合肥和佛山等城市也将陆续开设他们的第一家英国私立学校。

Distribution of British independent school campuses by region  
按地区分布的英国私立学校



The number of regions with a British independent school has more than **quadrupled in the past ten years.**

在过去的十年当中，拥有英国私立学校地区的数量增加了四倍以上。

Chongqing Zhejiang Guangdong  
Anhui Jiangsu Beijing  
Fujian Shandong Shanghai  
Sichuan Tianjin

N.B. Chart does not include schools with an unconfirmed opening date.

注：图表不包括未确认开放日期或地点的学校

# What's causing the 2<sup>nd</sup> Wave of British Schools? 英国私立学校第二次办学浪潮出现的原因有哪些？

## 1. Hybrid Schools 混合学校

International schools may only admit Chinese passport holding students if their curriculums incorporate the Chinese national curriculum for compulsory education (grades 1-9). A growing number of schools are now opting to set up branches with blended British-Chinese curriculums. This model has created access to a wider body of students and allowed for faster-paced growth.

国际学校一般只有在纳入中国义务教育课程（1-9年级）的情况下，才能招收中国学生。越来越多的国际学校现在选择建立分支机构提供英-中两国的混合课程。更多的学生因此受益并且获得了更快的成长空间。

## 2. Economic Growth 经济增长

China has continued along its trajectory of economic growth and internationalisation. This has created many new opportunities for international schools in second and third tier cities where a growing number of people are able to afford the relatively high school fees of British independent schools.

中国一直在经济增长和国际化的道路上前进。这为私立学在国内二三线城市开设国际学校创造了许多新的机会越来越多的人能够负担得起英国私立学校较为高昂的学费。

## 3. New Revenue Streams 新的收入来源

The cost of sending a student to a private school in the UK has grown exponentially in the past quarter century. ISC data found that private school fees rose 550 per cent between 1992 and 2016, far outstripping consumer prices and average wages that rose 201 and 217 per cent respectively. Creating new sources of income through overseas branches allows independent schools to grow without raising fees at home.

在过去的四分之一世纪里，英国私立学校的学费呈几何级数增长。据ISC的调查数据显示，从1992年至2016年，私立学校的学费上涨了550%，远远超过了消费者价格201%和平均工资217%的上涨幅度。通过开设海外分支机构创造新的收入来源的方式，私立学校能够在不增加本土学校的费用的基础上继续增长。

## 5. DIT Education 国际贸易部教育

The Department for International Trade was founded by the British government in July of 2016 with the objective of negotiating international trade agreements, promoting British business abroad and improving business environment and market access. These efforts have helped raise the profile of British organisations and introduce them to Chinese partners, paving the way for more cooperation.

## 4. Franchise Models 特许经营模式源

Franchise models are arrangements in which independent schools are paid a yearly franchise fee as well as a percentage of school fees in return for the use of their brand, curriculum and expertise by the new school. The number of British independent schools opting to use this model has been on the rise, as it provides schools with a steady income but with low levels of risk and less engagement from the franchisor.

特许经营模式是指加盟的私立学校每年支付特许经营费以及一定比例的学费，以取得品牌、课程和专业知识的使用权。目前来看，选择使用这种模式在国外设立分支机构的英国私立学校的数量一直在不断地增加，因为这种方式在为学校提供稳定收入来源的同时所承担的风险水平也较低，而且为特许经营节省了精力。

英国政府于2016年7月成立了英国国际贸易部，旨在帮助英国政府进行国际贸易协定谈判，促进英国海外业务，改善商业环境以及处理市场准入方面的事务。事实证明所有付出的努力都有效地提升了英国机构组织的形象，同时将它们介绍给中国的合作伙伴，并为两国加强合作铺平了道路。

## 6. The Golden Age of Relations 中英关系的“黄金时代”

China and the UK have been touted as experiencing a ‘golden-age’ of relations and both countries have made increased efforts to strengthen ties and encourage trade. This has helped create a positive environment for more Chinese and British companies to cooperate in education.

近年来随着中英两国关系的蓬勃发展，两国关系开启了“黄金时代”，在这样的背景下，双方加强了联系合作，并且增强了贸易往来的力度。这也为更多中英两国的公司在教育领域开展合作创造了一个积极的环境。

## 7. Property Companies 房地产置业公司

The prestigious brand of British independent schools can lend status to residential areas. Property companies looking to improve the standing of building complexes and raise prices have therefore been enthusiastic about acquiring schools with an international brand.

著名的英国私立学校品牌可以提升其所在区域的房产价值。因此，房地产置业公司热衷于收购具有国际品牌的学校来提升公司建筑产品的地位和价格。

## 8. A Long History of Education 悠久的历史

The UK is home to many of the oldest schools in the world, most of which boast famous historical figures amongst their alumni. As international schools receive increased attention from Chinese consumers, this history gives British independent schools a competitive advantage, allowing them to stand out in an increasingly crowded market.

英国拥有众多享誉世界、历史悠久的老牌名校，校友中有无数具有世界影响力的历史人物。随着国际学校越来越受到中国消费者的青睐，英国悠久的历史历史和传统为其私立学校提供了得天独厚的优势，使其在日渐激烈的国际教育市场竞争中脱颖而出。

## 10. Broader UK Education Appeal 更广阔的英国教育吸引力

The UK is one of the most popular study destinations for Chinese students. According to the UK’s Higher Education Statistics Agency, between 2006/7 and 2016/17, the number of first year Chinese students in China more than doubled from 25,135 to 66,415. For Chinese students hoping to gain a place at a university or school in the UK, British independent schools with a recognised name have a strong appeal.

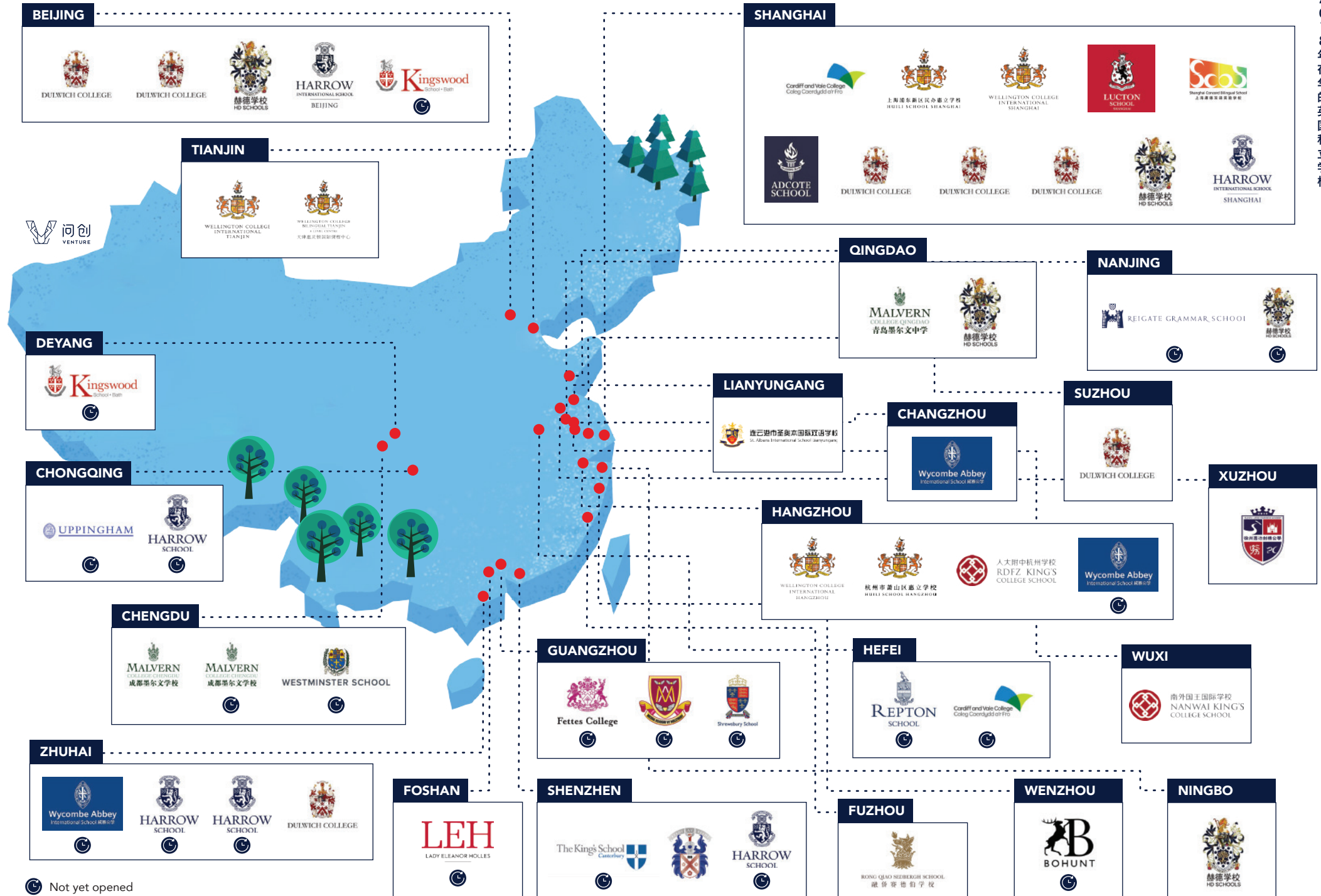
## 9. The British Curriculum 英国课程

The British curriculum enjoys a strong international reputation. ISC research found that British curriculums account for nearly half of curriculums in English-medium international schools in 2018. With their extensive history in the UK, British independent schools are regarded by parents as a safe pair of hands to successfully deliver this curriculum to Chinese students.

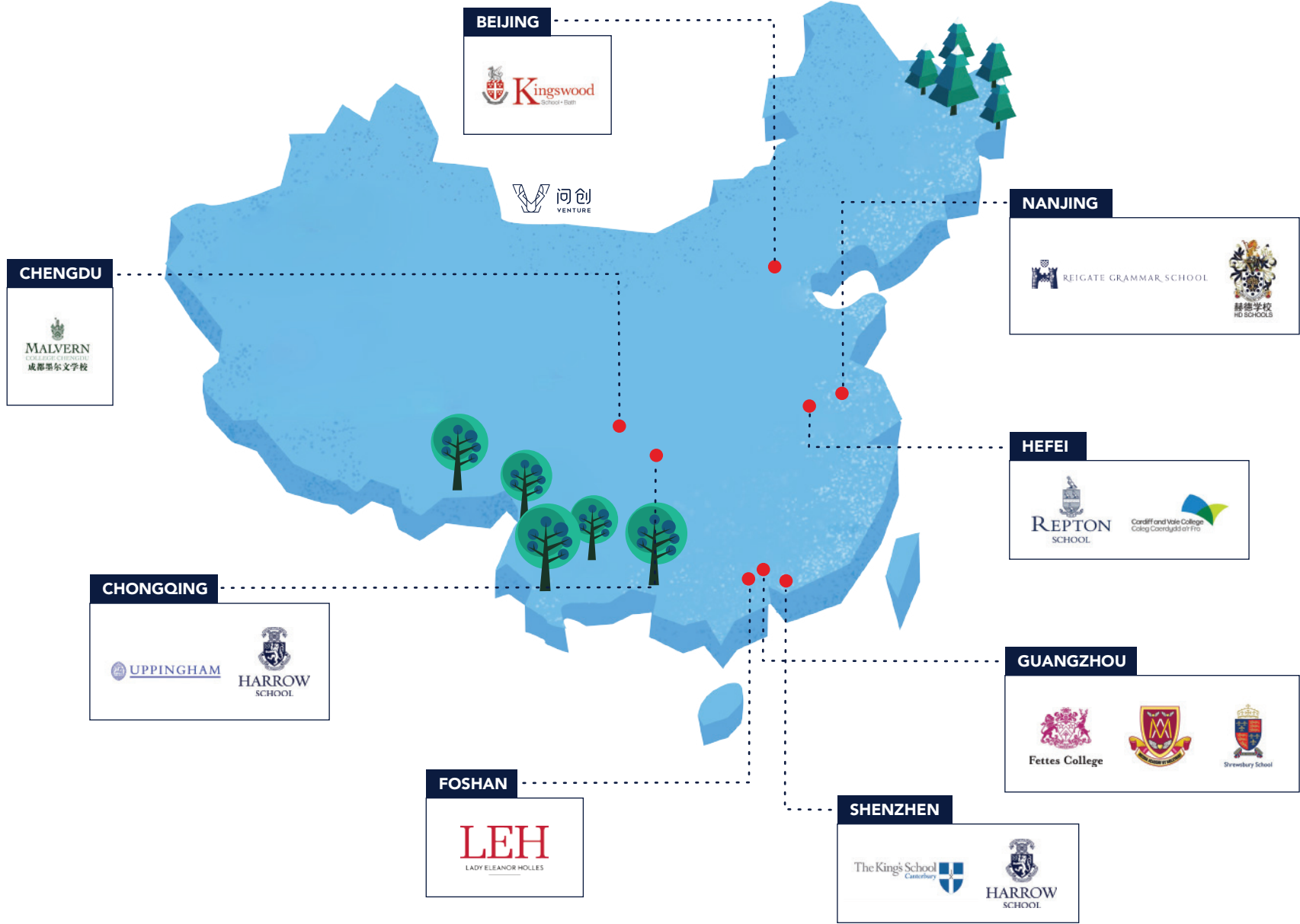
英国课程在国际上享有非常高的声誉。据ISC的调查数据显示，在2018年，英语授课的国际学校近一半以上的课程使用了英国课程。凭借其在英国的悠久历史，英国私立学校被学生家长视为成功向中国学生提供此课程的可靠选择。

在中国学生眼中，英国是最受欢迎的学习目的地之一。英国高等教育统计局的数据显示，从2006/7年到2016/17年之间，来自中国的大学一年级新生人数从25,135增加到66,415，增幅达一倍之多。对于那些希望在英国大学获得一席之地的中国学生来说，名牌英国私立学校毕业生的身份对学生而言具有强烈的吸引力。

# Map of British private schools across China | 中国各地开设英国私立学校的信息图表



Map of British private schools due to open in 2019 | 将在2019年投入使用的英国私立学校信息图表



# List of British Private Schools in China | 在华英国私立学校名单



2018年  
British Independent Schools in China  
在华的英国私立学校

		Location	Opening Year
<b>Adcote School</b> 阿德科特学校	Shanghai Adcote 上海阿德科特学校	Shanghai 上海	2017
<b>Bohunt School</b> 博翰特学校	Wenzhou Bohunt International School 温州博翰特国际学校	Wenzhou 温州	TBD (Scheduled date was 2018)
<b>Cambridge Judge Business School</b> 剑桥大学嘉治商学院	Xuzhou Cambridge Academy 嘉治商科剑桥国际学校	Xuzhou 江苏徐州	2018
<b>Cardiff &amp; Vale College</b> 卡迪夫公学	Cardiff & Vale Shanghai A-level Centre 卡迪夫公学（上海）中心	Shanghai 上海	2016
	Cardiff & Vale Hefei School 卡迪夫公学（合肥）	Hefei 合肥	2019
<b>Concord College</b> 康德学院	Shanghai Concord Bilingual School 上海康德双语实验学校	Shanghai 上海	2017
<b>Dulwich College</b> 德威学院	Dulwich Chollege Shanghai Pudong 上海德威外籍人员子 女分校（浦东）	Shanghai 上海	2003
	Dulwich College Beijing 北京德威英国国际学校	Beijing 北京	2005
	Dulwich College Suzhou 苏州德威英国国际学校	Suzhou 苏州	2007
	Dulwich International High School Zhuhai 珠海德威国际高中	Zhuhai 珠海	2010

		Location	Opening Year
<b>Dulwich College</b> 德威学院	Dulwich International High School Suzhou 苏州德威英国国际学校	Suzhou 苏州	2012
	Dulwich College Shanghai Puxi 上海德威外籍人员子 女学校（浦西）	Shanghai 上海	2016
	Shanghai Dehong Bilingual School 上海闵行区民办德润 学校	Shanghai 上海	2017
<b>Durham School</b> 杜伦学校	Durham International School 杜伦国际学校	TBD 待定	TBD
<b>Fettes College</b> 费得斯公学	Fettes College, Guangzhou 费得斯公学	Guangzhou 广州	2019
<b>Haileybury School</b> 黑利伯瑞学校	Meisha Aacademy by Haileybury 梅沙黑利伯瑞学校	Guangzhou 广州	2019
<b>Harrow School</b> 哈罗学校	Harrow International School Beijing 北京哈罗国际学校	Beijing 北京	2005
	Harrow International School Shanghai 哈罗上海国际学校	Shanghai 上海	2016
	Harrow ILA Chongqing 哈罗重庆礼德学院	Chongqing 重庆	2019

		Location	Opening Year
<b>Harrow School</b> 哈罗学校	<b>Harrow International Qianhai</b> 哈罗前海国际学校	Shenzhen 深圳	2019 
	<b>Hengqin Harrow ILA</b> 横琴哈罗礼德学校	Zhuhai 珠海	2020 
	<b>Tangjiawan Harrow ILA</b> 哈罗礼德学校唐家湾校区	Zhuhai 珠海	2020 
<b>Hurtwood House</b> 赫德伍德豪斯公学	<b>HD Ningbo School</b> 宁波赫德实验学校	Ningbo 宁波	2014
	<b>Shanghai HD Bilingual School</b> 上海赫德双语学校	Shanghai 上海	2016
	<b>HD Beijing School</b> 北京市朝阳区赫德双语学校	Beijing 北京	2017
	<b>HD Qingdao School</b> 青岛万达赫德双语学校	Qingdao 青岛	2018
	<b>HD Nanjing School</b> 赫德国际学校	Nanjing 南京	2019 
<b>King's College School</b> 国王学院学校	<b>RDFZ King's College School (King's College School)</b> 人大附中杭州学校	Hangzhou 杭州	2018
	<b>KCS Wuxi School (King's College School)</b> 无锡南外国王国际学校	Wuxi 无锡	2018

		Location	Opening Year
<b>King's School Canterbury</b>	<b>King's School Canterbury</b> 坎特伯雷国王学校	Shenzhen 深圳	2019 
<b>Kingswood School</b> 英国国王伍德公学	<b>Kingswood School</b> 英国国王伍德公学	Beijing 北京	2019 
	<b>Kingswood School</b> 英国国王伍德公学	Deyang 德州	TBD (Scheduled date was 2018) 待定 (预计2018年) 
<b>Lady Eleanor Holles School</b> LEH学校	<b>Lady Eleanor Holles School Foshan</b> 英国LEH国际学校	Foshan 佛山	2019 
<b>Lucton School</b> 莱克顿学校	<b>Lucton School Shanghai</b> 上海莱克顿学校	Shanghai 上海	2018
<b>Malvern College</b> 墨尔本中学	<b>Malvern College Qingdao</b> 青岛墨尔本中学	Qingdao 青岛	2012
	<b>Malvern College Chengdu</b> 成都墨尔本文学校	Chengdu 成都	2015
	<b>Malvern College Chengdu (Xinjin Branch)</b> 成都墨尔本文学校新津校区	Chengdu 成都	2019 
<b>Merchiston Castle School</b> 曼彻斯通城堡学校	<b>Merchiston Castle School Shenzhen</b> 深圳曼彻斯通城堡学校	Shenzhen 深圳	2018
<b>Myddleton College</b> 米德尔顿公学	<b>Myddleton College</b> 米德尔顿公学	TBD 待定	TBD 待定 

		Location	Opening Year
<b>Pate's Grammar School</b> 佩特文法学校	10 schools or other projects to be set up with Hailiang Education between 2018 and 2020. 2018年到2020年,海亮教育拟与佩特文法合作建立10所学校或者其他项目。	TBD 待定	2018-2020 
<b>Reigate Grammar School</b> 莱爵公学	<b>Reigate Grammar School Nanjing</b> 莱爵公学(南京)	Nanjing 南京	2019 
<b>Repton School</b> 莱普顿学校	<b>Repton School Hefei</b> 合肥莱普顿国际学校	Hefei 合肥	2019 
<b>Shrewsbury School</b> 修仕倍励国际学校	<b>Shrewsbury School Guangzhou</b> 黄埔修仕倍励国际学校	Guangzhou 广州	2019 
<b>The St Albans School, UK</b> 圣·奥本学校	<b>St Albans Lianyungang International School</b> 连云港圣·奥本国际双语学校	Lianyungang 连云港	2017
<b>St Bees School</b> 圣比斯公学	<b>St Bees School, China</b> 圣比斯公学中国分校	TBD 待定	TBD 待定 
<b>Sedbergh School</b> 赛德伯学校	<b>Sedbergh Fuzhou</b> 融侨赛德伯双语学校	Fuzhou 福州	2018
<b>Uppingham School</b> 阿平汉公学	<b>Uppingham School</b> 阿平汉公学	Chongqing 重庆	2019 
<b>Wellington College</b> 惠灵顿公学	<b>Wellington College International Tianjin</b> 天津惠灵顿国际学校	Tianjin 天津	2011

		Location	Opening Year
<b>Wellington College</b> 惠灵顿公学	<b>Wellington College Bilingual Tianjin</b> 天津惠灵顿国际课程中心	Tianjin 天津	2014
	<b>Wellington College International Shanghai</b> 上海惠灵顿外籍人员子女学校	Shanghai 上海	2014
	<b>Huili School Shanghai</b> 上海浦东新区民办惠立学校	Shanghai 上海	2018
	<b>Wellington College International Hangzhou</b> 杭州惠灵顿外籍人员子女学校	Hangzhou 杭州	2018
	<b>Huili School Hangzhou (Wellington)</b> 杭州市萧山区惠立学校	Hangzhou 杭州	2018
<b>Westminster School</b> 敏斯特公学	<b>Westminster School</b> 威斯敏斯特公学	Chengdu 成都	2020 
<b>Wycombe Abbey</b> 威雅公学	<b>Wycombe Abbey International School</b> 常州威雅公学	Changzhou 常州	2016
	<b>Wycombe Abbey</b> 杭州威雅公学	Hangzhou 杭州	2020 
	<b>Wycombe Abbey</b> 珠海威雅公学	Zhuhai 珠海	2020 



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## Consultancy

We work with British education organisations at every step of their entry into the China market, offering pitch decks, marketing materials, translation services and more.



## Projects

Working with government bodies and education organisations, our team of passionate educators, facilitators and project managers deliver high-quality projects, including workshops, teacher training and education events.



## Research

To ensure British businesses can make smart, cost-effective China decisions, Venture offers a range of bespoke research reports, including personalised market analysis, regional data, and expert insight into a particular sub-sector.



**CHINA  
READY**

## China Ready

For just £800, Venture Education offers a bespoke thirty page assessment of your company and its readiness for the Chinese market, offering market analysis, expert opinions and a unique readiness score.