



Department for  
International Trade

# Development in Mongolia's Education Sector

**Opportunities for UK education suppliers**

# Executive Summary

In the face of a growing economy and developing prosperity among the Mongolian population, there are a myriad opportunities for international collaborations, ventures and partnerships within Mongolia's education sector. The government has been targeting education sub-sectors with extensive reforms over a number of years, making significant efforts to provide a welcoming business environment for international organisations.

In our surveys of UK and Mongolian businesses, over 80% of respondents indicated that they held optimistic views on the business outlook for international education in Mongolia, and an overwhelming 87% were confident that a UK brand name would give a competitive advantage in Mongolia's international education market.

As Mongolians continue to look outward to international markets to support development, we found a particularly high regard for UK education. In our survey of Mongolian consumers, 93% of respondents indicated a positive view of education in the UK, somewhat higher than that of education in Australia, Canada or the United States.

The Mongolian government has been implementing comprehensive reforms of the country's education sector since its announcement in 2006 of the 'Master Plan for Development of the Education Sector' ('the Master Plan'). In this document, detailed steps and objectives are outlined for every sub-sector of the education market, from early years to higher education. Through our round of surveys, interviews and desk research, we have identified a range of opportunities that span the whole of the education sector.

- At kindergartens and international schools, there is significant opportunity for collaborations with schools in carrying out teacher training with local teachers, providing high quality teaching resources and supporting the development of curricula to meet international standards.

- In the English language sector, key areas of opportunity exist in providing English training to staff at public schools, working with major mining companies to deliver contractually-obliged workforce training and exploring innovative online English education pathways to populations in Mongolia's more remote regions.
- In higher education, opportunities are primarily identified around building capacity at universities, in particular partnering with local universities to provide research and joint programmes in the fields of science and technology, as these are core governmental targets for development.
- As Mongolia sets out to modernise its vocational training sector, a wide variety of opportunities lie in training local workforces in the construction and maintenance of a number of large-scale infrastructure projects, including the country's new railways and electrification, both of which are being developed in line with international standards.

There also remain some challenges when it comes to pursuing opportunities in the Mongolian education sector. From our business surveys, the five most frequently cited challenges for British business currently operating were (in order of frequency): the high cost of UK education, differences between British and Mongolian education styles, staff recruitment, low levels of English proficiency and the small size of the market. In addition to these five, a number of other challenges were also noted by smaller clusters of participants in the survey including a cultural tendency towards last-minute or to-final-deadline completion, competition with other education systems, limited access to some facilities and resources, a 'development mindset' among some international businesses and Mongolia's uneven population distribution.

Despite the challenges mentioned above, this report finds that companies willing to align their business activities with Mongolia's strategic direction and to work with local education organisations are still likely to uncover rich opportunity in this growing market.

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## Introduction

On the 21st of September 2019, the British Embassy of Mongolia, in collaboration with Venture Education, held the 4th iteration of the InspireMe Education Festival to celebrate and promote British Education in Mongolia. This report will be a follow-up to the success of the festival and provide a deeper look at the real opportunities that exist within Mongolia for UK businesses, products and services in the education industry.

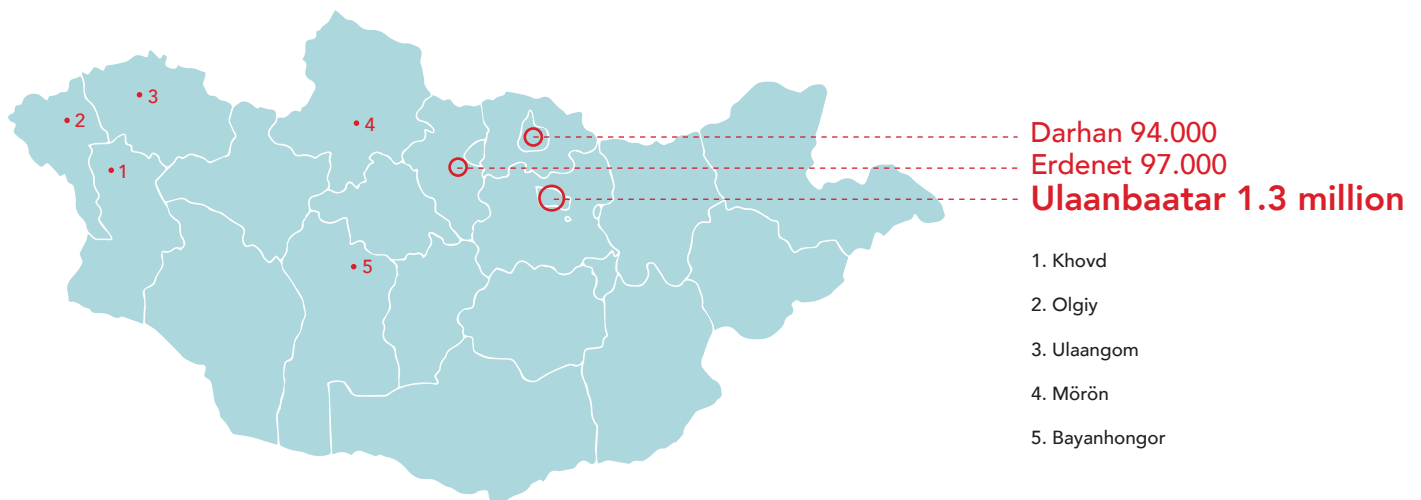
Mongolia is estimated to be home to as much as USD1 trillion-worth of untapped precious metals and minerals, working out to more than USD333,333 per capita.<sup>1</sup> The economic potential of these mineral and metal deposits was seen during the rapid growth of Mongolia's economy in the early 2010's, overwhelmingly driven by a huge boom in Mongolia's mining industry. The subsequent slowdown in the mid 2010's and attendant decrease in private consumption led to a short period of negative economic growth. More recently however, positive trends in the Mongolian economy have restored confidence in the private sector: in 2018 and the first half of 2019, growth has recovered to 7.2% and 7.3% respectively.<sup>2</sup> Demographically, this recovery has particular potential in education as a growing number of young Mongolians become willing and able to invest in high quality education for themselves and future generations.

Beginning with a contextual look at the current condition of the Mongolian education market, this report seeks to provide British Education providers and businesses with a comprehensive look at the Mongolian education system from early years through to higher education, highlighting key opportunities for growth, and potential pitfalls for UK education providers and related businesses. The research presented in this report offers an analysis of Mongolia's current socio-economic environment and domestic education system; the current international education environment; and recent and potential future developments within the market. The data in this report was collected via a combination of desk-based research, telephone interviews, in-person interviews, and surveys conducted at the 2019 InspireMe Education Festival.

# 2 | Socio-economic overview

Mongolia's economy and demography have a number of unique characteristics that any business should be aware of before entering the market.

People are disproportionately concentrated in its capital



Mongolia is divided into 21 aimags (provinces), which are divided into 331 administrative districts, as well as the capital city, Ulaanbaatar, which operates and is governed as a capital city municipality. With around 1.5 million residents, Ulaanbaatar alone is home to more than 40% of the country's 3.2 million population.<sup>3</sup> Mongolia's other cities are significantly smaller, with the next two largest cities each having a population of less than 100,000.

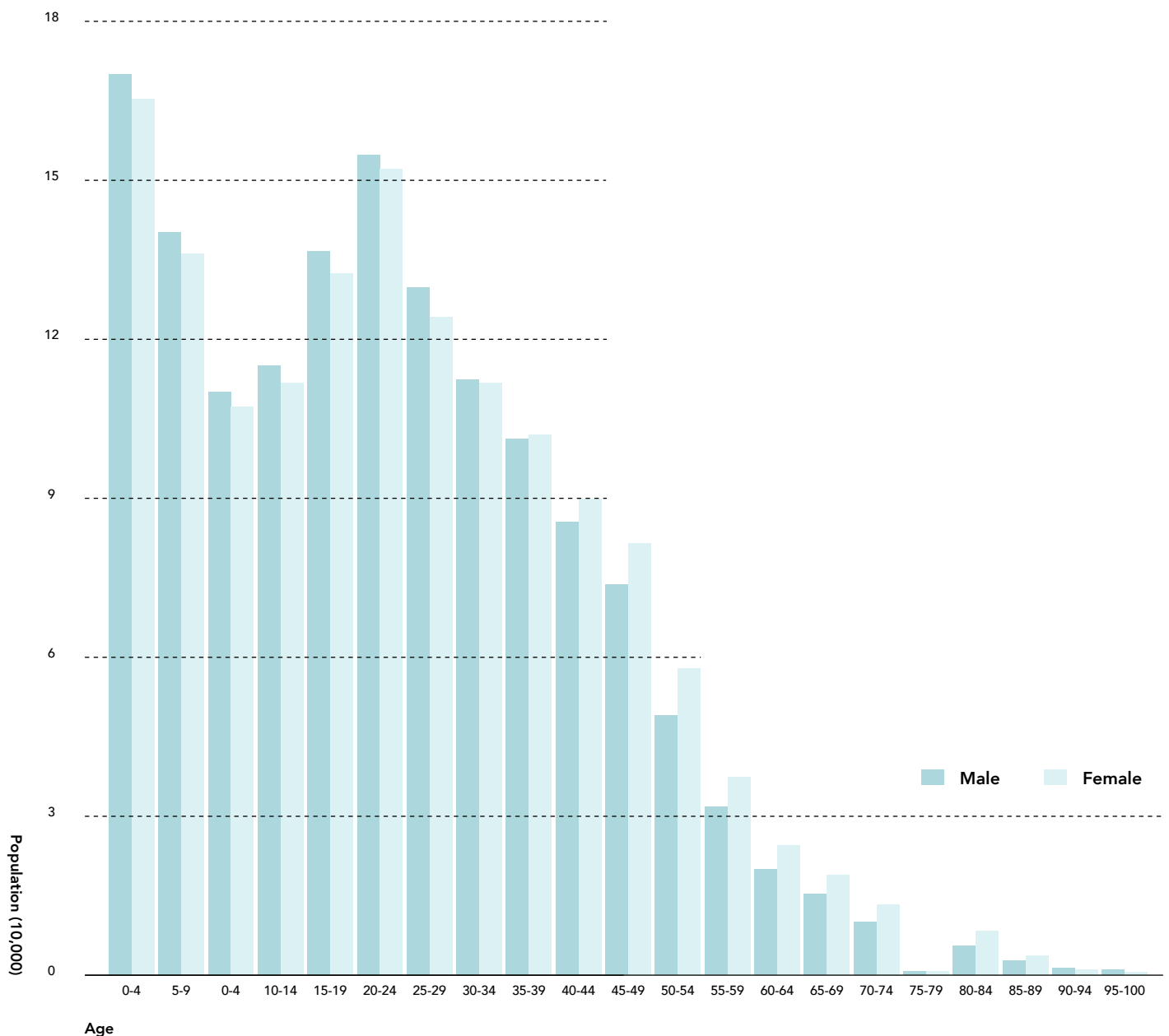
Erdenet is the second largest city, with a population of 97,000 in 2017. The city is rich in minerals and boasts the 4th largest copper mine in the world. Darkhan, the country's third largest city, is home to around 94,000 people. Darkhan is not only the heavy-industry centre of Northern Mongolia, but is also an education hub, with 10 higher education institutions.

The largest non-urban population group are the nomadic herders and farmers that inhabit the country's vast Steppe landscape. These nomadic populations make up nearly a third of total population numbers.<sup>4</sup> This poses a number of logistical issues for the Mongolian government, not least being that this large percentage of nomadic population has less access to education and other key necessities, as well as a significantly lower income than those in the urban centres of Mongolia.

## Mongolia has an incredibly young population

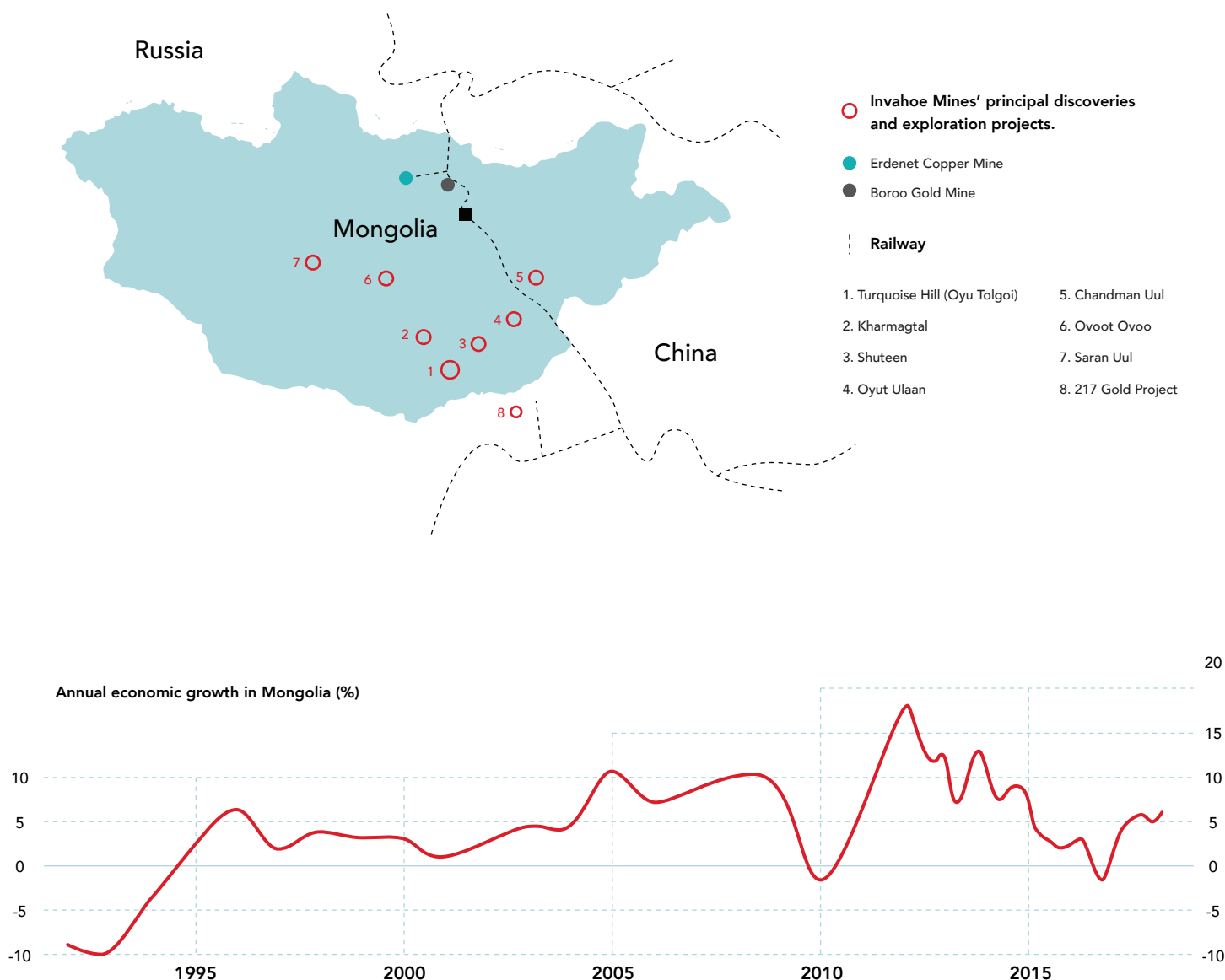
Home to just 3.2 million people, Mongolia is the world's least densely populated nation, with roughly 2 people per square kilometre and stable population growth of around 1% annually.<sup>5</sup> Whilst the Mongolian population is small, the number of young people has been on the rise, and people under the age of 30 now make up around 59% of the population.<sup>6</sup> This makes Mongolia the nation with the youngest population average in North East Asia. Whilst this has led to a strain on the economy and education market in the short run, the Mongolian economy has strong potential to grow quickly in the coming decades.

Population distribution of Mongolia



## Mongolia's fast growing economy is heavily driven by mining

Economic growth in Mongolia remains driven by private consumption and mining investment, with mining making up 21% of GDP, 70% of FDI, 35% of the National Budget Income, 71% of Industrial Output and 85% of export earnings. It is hard to understate the importance of mining to Mongolian economic growth. The single largest foreign investment in Mongolia is the Oyu Tolgoi (Rio Tinto) mine which is estimated to possess over 35 million tons of copper and 1,275 tons of gold.<sup>7</sup>



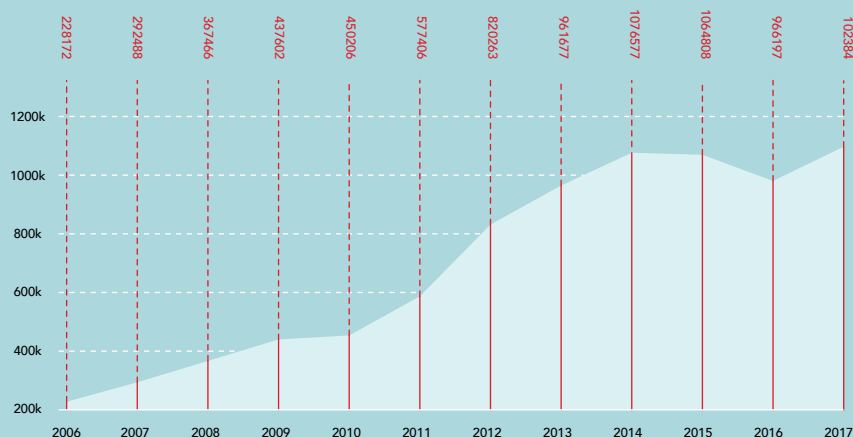
Source: Tradingeconomics.com | National Statistical Office of Mongolia

## Household expenditure is relatively low, but growing

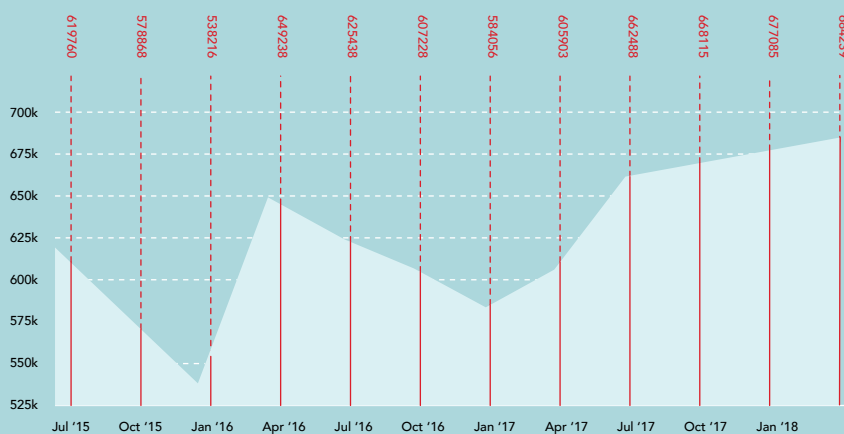
At the end of 2018, average monthly household income across Mongolia stood at just over MNT 1.2 million, which equates to around USD472 per month.<sup>8</sup> This indicates that disposable income across Mongolia is relatively low, with only 7.8% of households having monthly expenditure exceeding USD 787, or MNT 2.8 million.<sup>9</sup>

Household expenditure on non-food expenses and services rose over the course of 2018 as the economy grew.<sup>10</sup>

Household expenditure: monthly average by year



Household expenditure: monthly average on non-food expenses and services





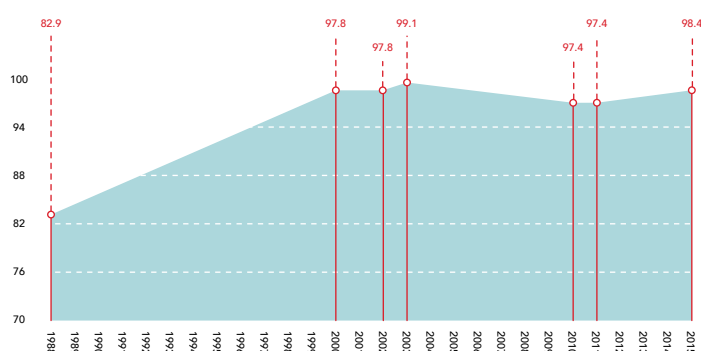
# 3 | Education Development

Between 1921 and 1990, education was a priority for the Mongolian People's Republic. Driven by considerable investment in the education of nomadic children and the provision of primary and secondary education, literacy rates surged. Current literacy rates remain high, especially when compared to other similar middle-income countries, and have levelled around 97% for nearly two decades.<sup>11</sup> Despite these improvements, the current education system bears many of the faults present in the Soviet system, notably operating as a highly specialised education system with little flexibility. However, the ubiquity of education in Mongolia has created a strong foundation from which the government aims to reform the education system at every level.

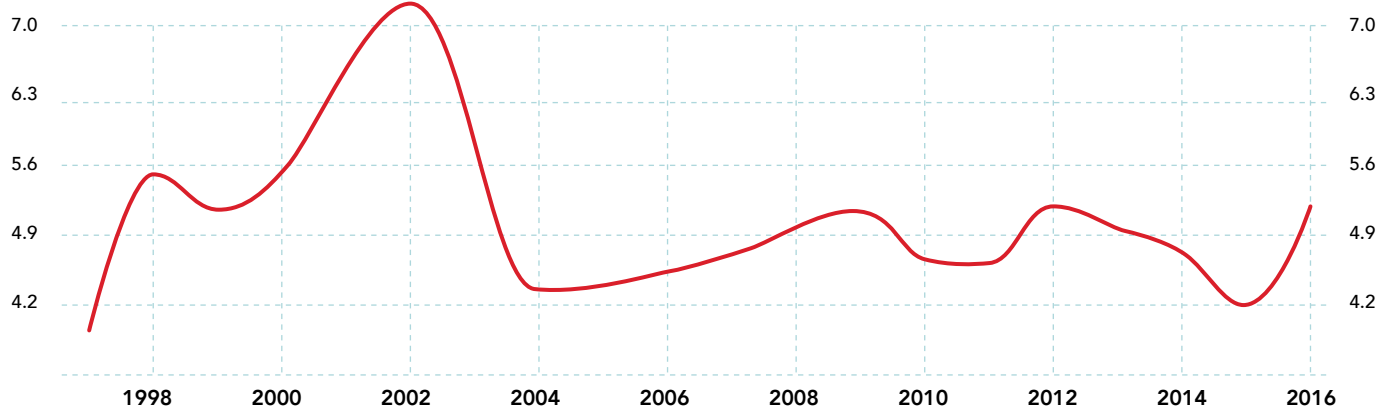
The bulk of the government's education budget is allocated to primary and secondary education. Higher education institutions (HEIs) receive around 12% of the total, leaving them highly dependent on income generated by tuition fees.<sup>12</sup> Private HEIs receive almost 60% of their funding from tuition fees, and public HEIs almost 58%. Governmental pressure on both public and private HEIs keeps tuition fees low, generally below USD 1,000 per year.<sup>13</sup> As a consequence, many HEIs overfill classes, often with under-qualified students. They also lack the financial capacity to attract qualified and well-trained teachers and researchers and to invest in up-to-date equipment, libraries, and laboratories. This has led to low-cost, low-quality higher education outcomes.

Other sectors in the education market also suffer from insufficient teaching quality and inadequate provision of materials, and curricula do not meet international standards. Specific portions of the population also face barriers to education. For example, disabled children across Mongolia have very limited special provision to ensure parity of access, and those schools that do exist receive far less funding than mainstream schools. Children from poorer regions and poorer communities are much less likely to attend school, despite stated aims of compulsory universal provision for primary and lower secondary education nationwide. The National Program for Distance Education and E-Mongolia National Program (2005-2012) have gone some way to improving education for those sections of the population.

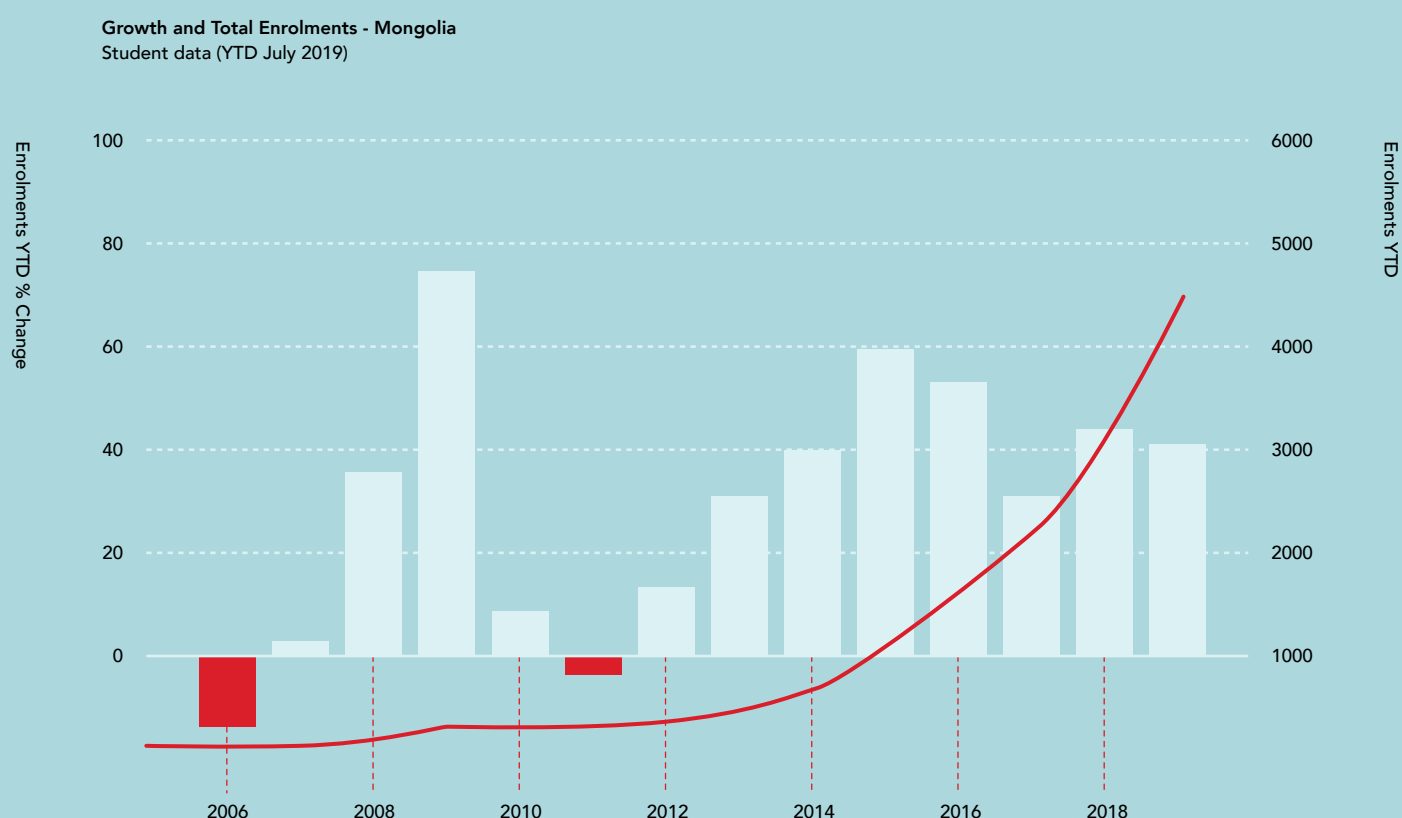
Literacy (%)



Mongolian government expenditure on education as a total of government expenditure (%)



One particular problem that was mentioned by many respondents in our surveys and interviews was the politicisation of education. During the period between 1995 and 2003, the number of higher education institutions soared to nearly 200, and many of these were opened on the back of campaign promises to provide education for the people of Mongolia. This proliferation of institutions led to a decrease in the quality of the education provided. Efforts to better regulate the higher education sector means that only 97 HEIs remain today, ensuring each institution is able to attract more students and operate under a larger budget.<sup>14</sup>



## Aid Projects and Government Initiatives

Though still falling some way short of meeting international standards, there are numerous ongoing initiatives to improve compulsory education in Mongolia. The World Bank commissioned READ (Rural Education and Development) Project, which ran between 2007 and 2013, benefited a total of 130,000 in Mongolia's rural student population, leaving behind a local professional development network of 95 schools and 178 mentor teachers. Initiatives such as this are in operation across all sectors of Mongolian education and provide evidence of the progress being made within the sector.<sup>15</sup>

The Asian Development Bank has also, as of October 2019, carried out 25 education projects in Mongolia. These have covered a range of sub-sectors, and there are currently 8 active projects covering higher education, science and technology, vocational training and access to education.<sup>16</sup>

In 2011, the government signed the Mongolia-Cambridge Education Initiative (MCEI) with Cambridge Assessment International Education. This ambitious project set out to align Mongolia's entire education system with international standards. The MCEI has achieved substantial progress in all areas of the education system, though total reformation of the education system remains some way off. Areas in which the MCEI report recommended further collaboration were improving assessment, ensuring effective progression between courses at schools, universities, and TVET (Technical and Vocational Education and Training) institutions and the world of work, improving school teacher and leader quality, and finalising the assessment framework of the new curriculum.<sup>17</sup>

According to some interviewees, the existence of aid projects across the sector has led to a 'development mindset' among some institutions in Mongolia when it comes to international education, with some believing that the government should mandate budgets for English language training, teacher training and education outreach into the Mongolian Steppe.

The government has been proactive in its quest for high quality education for all, creating open environments for foreign business and aid projects to operate, as well as setting its own ambitious targets for education development nationwide.

The politicisation of education has also had a negative impact on ongoing education projects in Mongolia. Local educators noted that the initial proposal for the MCEI project had the ambitious goal of implementing at least some of the Cambridge curriculum in schools across the country. Progress, however, has since been somewhat hampered by elections and the subsequent change of government.

# 4 | Early years

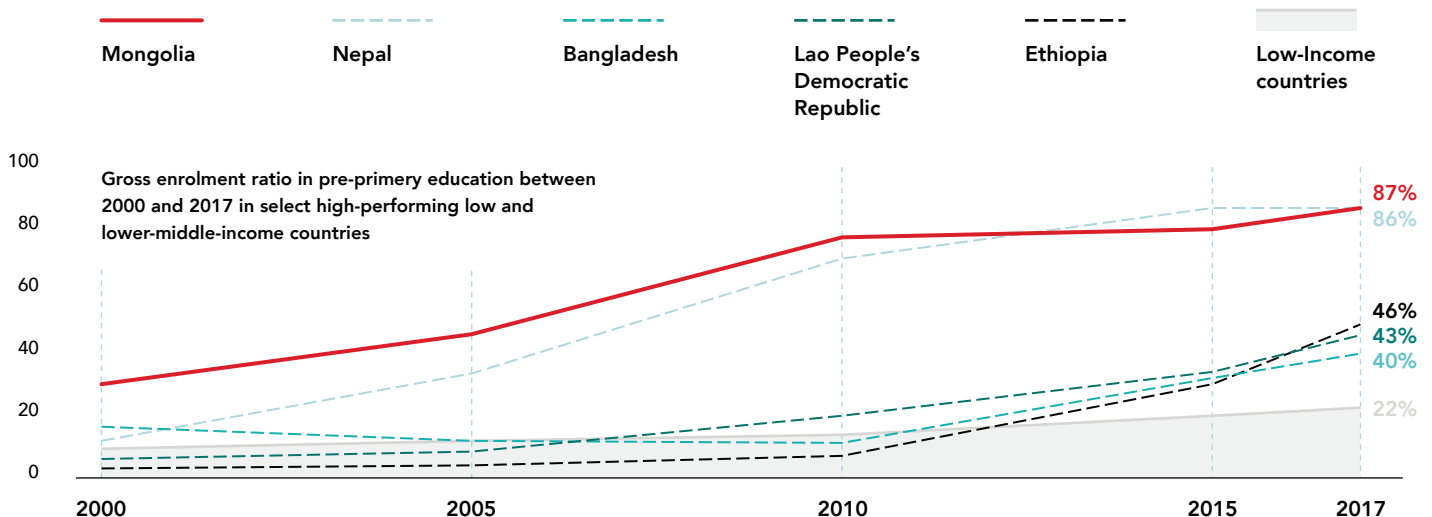
## State of Sector

Early years education in Mongolia has been the target of widespread reforms and development objectives as outlined in the 2006-2015 Master Plan. In this plan the government outlined key objectives for the early years sector; increasing preschool enrolment, developing preschool education services to meet the needs of children and improving policies and the legislative and regulatory environment for the provision of preschool education services. A total of 26% of Mongolia's education budget is spent on the early years sector, the second highest allocation of anywhere in the world.<sup>18</sup> The government has also pledged to provide kindergarten education to all children by 2020, but whilst the budget for the construction of these new kindergartens was allocated in the 2019 budget, the project has been delayed due to issues related to land acquisition.

The large budget for early years education has led to impressive enrolment figures. Between 2000 and 2017, 86% of Mongolia's pre-primary age children were enrolled in early childhood education, far in excess of the global average of 50%, and the average of 81% across East Asia and the Pacific.<sup>19</sup>

'Gers', or mobile kindergartens, act as satellite locations in Mongolia's vast Steppe during the summer months, and were set up to tackle the issue of providing early years education to the near third of Mongolia's population that is nomadic. The mobile kindergartens use qualified kindergarten teachers from population centres to conduct the teaching, thus ensuring that the quality of education provided is in line with that of the population centres around the country. Parent-facilitated home learning programmes have been developed in conjunction with the ger kindergartens to bridge the gap when rural ger kindergartens are not in operation. Ger kindergartens also operate within the most densely populated areas of Ulaanbaatar where space is limited.

Most private schools in Ulaanbaatar have an attached kindergarten section from the ages of 3-5, although these attached kindergartens are also not affordable for many Mongolian households.



## Policy Environment

Ambitious government plans have lifted early years education enrolment far above the global average, and the government's pledge to achieve 100% enrolment highlights the favourable environment in the early years sector.

Areas of focus in the master plan included:<sup>20</sup>

**Reducing of the student/teacher ratio from 13.2 to 11.6**

**Reducing the number of students per class from 27.5 to 25.0**

**Ensuring 100% of teachers have professional qualifications**

**Providing manuals, training and other materials for students and staff in pre-school education**

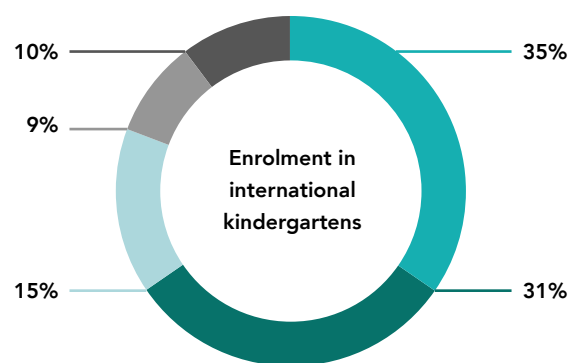
Mongolia's vast kindergarten network has struggled to cope with the expansion of pre-school age children. Government-funded kindergartens have space for only half of all children aged between two and five in Ulaanbaatar, and thus these kindergartens manage their admissions via online ballots.<sup>21</sup> Those who miss out on places in the online ballots are left with few options; fee-paying kindergartens, non-attendance, resorting to bribes, or leveraging connections. In a survey conducted in 2017 on corruption in Mongolia's education system, 77% of respondents admitted to leveraging their positions or paying bribes to kindergartens to accept their children. 40% of respondents said that they had given cash, gifts, or free services in return for school places and other benefits, with the majority of these cases involving kindergarten and primary schools.<sup>22</sup>

## Opportunities and Challenges

Early years education was the second-most cited area of opportunity by businesses surveyed, while 79% of respondents in our consumer survey expressed some level of interest in enrolling themselves or their child in an international kindergarten. The country is currently not home to any major international kindergarten brands, although the major international schools, all of which are located in Ulaanbaatar, typically have an early years department. However, considering the high cost of hiring an international teacher (generally around USD 1,000 to 1,500 a month), as well as the relatively low expenditure of most Mongolian families, attracting a sustainable number of students would be difficult for any new school.

Local educators in Mongolia, repeatedly referenced the difficulties of attracting high quality foreign staff. Mongolia is often overlooked as a destination for foreign talent in favour of countries with higher salaries and more internationally recognised locations, such as China and the Middle East. Issues perceived as negatively affecting the quality of life in Mongolia, such as high pollution levels, were also brought up as potential deterrents to foreign staff. Issues were also raised with regards to finding suitably qualified local talent, and the quality of pre-school education training in Mongolia has been a consistently targeted area of improvement for the government.

Opportunity in this sector is primarily concentrated in Mongolia's extensive domestic kindergartens, both public and private. The aims and objectives of government education reforms are ambitious and leave ample opportunity for foreign organisations to enter the market. Foreign enterprises willing to engage with the early years sector in areas addressed by government plans, such as teacher training, provision of professional qualifications, and provision of teaching materials can expect freedom to operate within the market. With a strong desire for Mongolia's education system to align with international standards, UK education organisations are particularly well-positioned to collaborate in this area.



# 5 | K-12

## State of Sector

During the Soviet era, K-12 education in Mongolia has maintained unusually high levels of school enrolment when compared to other similar middle-income nations. In 2016, 99.01% of the school-age population was enrolled in formal education, and education remains well respected amongst older generations.<sup>23</sup> As nearly all Mongolians expect to receive an education, even those from the large nomadic population in Mongolia who attend schools with boarding facilities. This, coupled with Mongolia's young population, has meant that the growth rate of enrolment has outstripped the growth rate of schools themselves, with the ratio of students to teachers rising to an average of 30.38 students per teacher in 2017 from 27.59 in 2013.<sup>24</sup> It is to be noted that the student to teacher ratio is much higher in Ulaanbaatar than other cities in towns across the country.

Mongolia's 1991 Education Law specifically made provision for the establishment of private educational institutions. Since then, the number of private primary and secondary schools in the country has increased at an average annual rate of 20%. In 2019, there were 107 non-government schools operating in Ulaanbaatar alone. Rising student:teacher ratios in public schools has ensured that Mongolians have become increasingly interested in sending their children to fee-paying private schools, which can provide high quality education, often with elements of foreign curricula. In Ulaanbaatar, where the vast majority of private schools are located, fees for Mongolian private schools range from MNT 750,000 million to 12 million (USD 275 to 4,400) a year. International school fees, such as those of the International School of Ulaanbaatar (ISU), can reach MNT 73 million (USD 26,834) per year.<sup>25</sup> These fees ensure that only a small fraction of the native population, and some in the relatively small expatriate community can afford the more expensive private and international school options.

## Poilycy environment

As highlighted in the 'the Master Plan', improving the quality of education has been a key focus for the Mongolian government. The Mongolian national curriculum as it was in the mid-2000s was insufficient in providing students with high-quality education. In 2011, the government announced a project in conjunction with Cambridge Assessment International Education to reform the Mongolian education system to conform with international standards and meet the educational needs of the growing economy. The outcome of this project has set a foundation for the implementation of internationally recognised curricula, as well as high quality training for teachers. The Cambridge curriculum is currently used in 17 schools across Mongolia, demonstrating the market for international curricula.<sup>26</sup>

### Cambridge schools in Mongolia



British School  
of Ulaanbaatar  
[britishschool.edu.mn](http://britishschool.edu.mn)



Darkhan Empathy School  
[darkhanempathy.edu.mn](http://darkhanempathy.edu.mn)



Global Innova School  
[global.edu.mn](http://global.edu.mn)



Gurvan Tamir School  
[gtis.edu.mn](http://gtis.edu.mn)



Jargalan International  
School  
[jargalan.edu.mn](http://jargalan.edu.mn)



Mongol Aspiration  
International School  
[mongolaspiration.edu.mn](http://mongolaspiration.edu.mn)



Mongol Bilig Oyun  
International School  
[mbo.edupage.org](http://mbo.edupage.org)



Mongolian Royal Academy  
[royalacademy.edu.mn](http://royalacademy.edu.mn)



New Beginning  
International School  
[newbeginning.edu.mn](http://newbeginning.edu.mn)



New Century Leadership School  
[newcentury.edu.mn](http://newcentury.edu.mn)



New Era International School  
[newera.edu.mn](http://newera.edu.mn)



Orkhon Empathy School  
[empathy.edu.mn](http://empathy.edu.mn)



Orkhon Khasu School  
[orkhonschool.edu.mn](http://orkhonschool.edu.mn)



The English School of Mongolia  
[esm.edu.mn](http://esm.edu.mn)



Ulaanbaatar Elite  
International School  
[elite.edu.mn](http://elite.edu.mn)



Ulaanbaatar Empathy School  
[www.ubempathy.mn](http://www.ubempathy.mn)



Orchlon International School  
[www.orchlon.edu.mn](http://www.orchlon.edu.mn)



## Poilycy environment

### International Schools in Ulaanbaatar



American School  
of Ulaanbaatar  
[asu.edu.mn](http://asu.edu.mn)



British School  
of Ulaanbaatar  
[britishschool.edu.mn](http://britishschool.edu.mn)



The English School  
of Mongolia  
[esm.edu.mn](http://esm.edu.mn)



Elite International  
School  
[elite.edu.mn](http://elite.edu.mn)



French International  
School of Ulaanbaatar  
[ecolefrancaiseiob.wix.com/efiob](http://ecolefrancaiseiob.wix.com/efiob)



International School  
of Ulaanbaatar  
[isumongolia.edu.mn/](http://isumongolia.edu.mn/)

School fees at the international schools mentioned here vary by year of study. Primary school fees range from 7 million MNT to 51.9 million MNT. Middle school fees range from 11.5 million MNT to 60 million MNT. Senior school fees range from 11.3 million MNT to 66 million MNT.

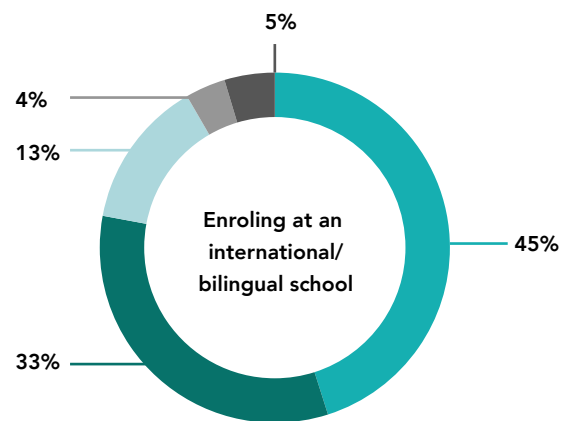
For a more comprehensive look at private schools and their fees please see the appendix

## Opportunities and Challenges

There has been consistent growth within the Mongolian K-12 sector, and with parents seeking high quality education for their children, opportunity for international education remains strong. In our survey of Mongolian consumers, 91% of respondents expressed some level of interest in attending or sending their child to a bilingual/international school with 45% saying they were 'very interested'.

However, despite strong interest in international K-12 education, cost is a significant factor that must be considered by international K-12 education providers. As highlighted above, the tuition fees of the major international schools (such as the International School of Ulaanbaatar, the English School of Mongolia, the American School of Ulaanbaatar and the British School of Ulaanbaatar) are extremely high when compared to the prices of most of Ulaanbaatar's private schools. This issue was also addressed by educators at the InspireMe Festival, where nearly a third of respondents stated the cost of international education as one of the biggest challenges for education providers in Mongolia. Though a UK-branded international school may be able to stand out in Mongolia's market (there are currently no branches of UK independent schools in Mongolia), there would be strong competition for students that are able to afford high tuition fees. Any new school would likely have to recruit students who are already in attendance at Mongolia's other major international schools, a task that could prove challenging. As with early years education, opportunity is more evident in working with existing schools to provide curricula and teacher training. The government of Mongolia has already demonstrated an inclination to cooperate with international education companies to implement wide-scale curriculum reform and teacher training, as was seen with the Cambridge International Initiative from 2011.

There are few schools in Ulaanbaatar equipped to perform teacher training to international standards, and teachers from private schools in the country noted that attendance at state-provided teacher training was low. This is less due to a lack of demand and more due to deficiencies of existing training 'camps'. Comments were made regarding the low-quality content of the training, as well as the fact that such camps would often



require teachers to attend for up to two weeks, a length of time that was unrealistic for full-time teachers. Educators in our interviews noted that high quality professional training would be of great interest to both public and private school teachers, particularly if international organisations worked with schools to establish their own training systems which would allow them to then carry out training internally. Foreign enterprises seeking to find a niche in this market might consider partnering with a local school to provide this kind of training.



**The experience from other teachers is that they don't seem to learn anything (at state-provided training sessions). Now they prepare and train their own teachers. It's better if schools have their own trainers who monitor and train teachers throughout schools. This is what we are doing and it's very beneficial.**

*- Mongolian international school*























In addition to teacher training, there is also a demand for internationally recognised and standardised curricula. It should be noted that as the majority of private schools in Ulaanbaatar are aimed at Mongolian students only, teaching conducted solely in English faces some backlash from prospective parents as well as teachers in these schools, as it can be seen as erasure of the Mongolian language and culture. Working with local partners to develop bilingual curriculum is likely to receive a much more positive reception.

# 6 | ELT

## State of Sector

Education First English Proficiency Index

### Low Proficiency

 36 China	 47 Cuba
 37 Japan	 48 Panama
 38 Russia	 49 Peru
 39 Indonesia	 50 Colombia
 40 Brazil	 51 Pakistan
 41 Macau SAR	 52 Thailand
 42 Uruguay	 53 Guatemala
 43 Mexico	 54 Ecuador
 44 Chile	 55 Tunisia
 45 Bangladesh	 56 U.A.E.
 46 Ukraine	 57 Syria

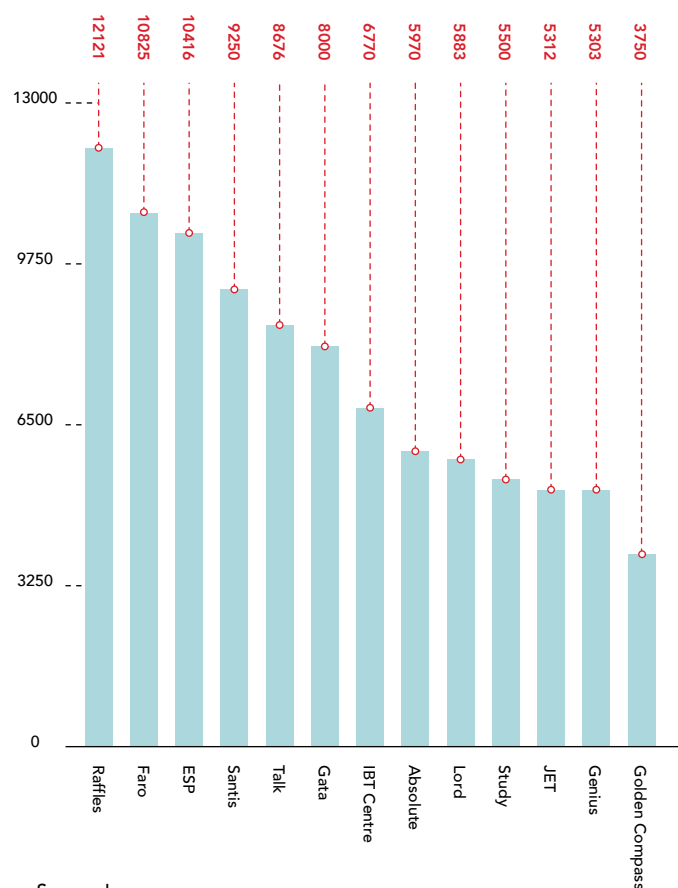
### Very Low Proficiency

 58 Qatar	 69 Oman
 59 Morocco	 70 <b>Mongolia</b>
 60 Sri Lanka	 71 Saudi Arabia
 61 Turkey	 72 Angola
 62 Jordan	 73 Kuwait
 63 Azerbaijan	 74 Cameroon
 64 Iran	 75 Algeria
 65 Egypt	 76 Cambodia
 66 Kazakhstan	 77 Libya
 67 Venezuela	 78 Iraq
 68 El Salvador	 79 Laos

English language levels in Mongolia are relatively low, and the country was categorised as having 'very low' English proficiency in Education First's 2017 English Proficiency Index (EPI) which analyses English levels in non-native speaking countries, ranking 71st out of the 80 countries and regions assessed.<sup>27</sup>

This is perhaps contradictory when local educators estimate there to be more than one hundred different English language centres in Ulaanbaatar alone. However, over-saturation of the market has led to a 'race to the bottom' in pricing, in turn leading to a reduced quality of training provided. Due to their higher price points, internationally accredited centres hiring fully qualified staff sometimes face challenges with student recruitment. A 2017 survey of prices by ikon.mn found that the average hourly rate of an IELTS class ranged from MNT3,750 (USD1.4) to MNT 12,121 (USD4.5) an hour, a relatively low price point compared to international pricing norms.<sup>28</sup>

Average hourly rate of Mongolia IELTS classes (MNT)



Source: Ikon

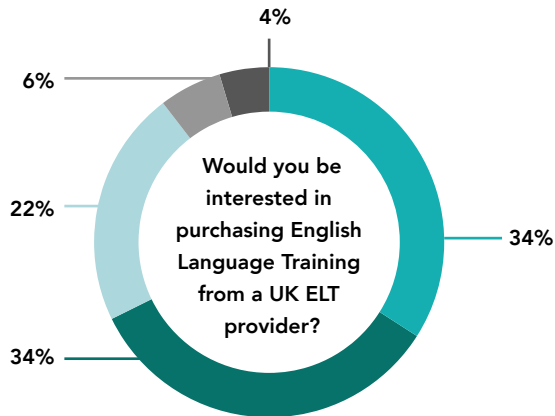
## State of Sector

While the Mongolian ELT market is largely comprised of small centres, several global organisations are also in operation. These include Santis and parent company inLingua, JET English Schools, and Wall Street English. The latter opened their first centre in the Ulaanbaatar in 2019, with plans to open a further 4 centres in other urban centres in partnership with Metro Development Group Mongolia. According to one educator on the ground, the key market of learners for ELT centres is students aged in grades 10-12, especially those looking pursue higher education options in English-speaking countries.

## Policy environment

English was first introduced alongside Russian into Mongolia's national curriculum in 1995, and the popularity of the language since has resulted in the language receiving increased emphasis from the Mongolian government. The latest of these includes the 'Government of Mongolia's 2006-2015 Education Master Plan', which set out to 'Renew English textbooks, and increase books and publications for children to read in English', and the Cambridge International Initiative, where the government worked with Cambridge to set up English-Mongolian bilingual schools.

## Opportunities and Challenges



As Mongolian companies increasingly look outward to international markets, the English language naturally becomes more important for companies and individuals. Market research indicates that professionals with English qualifications will earn a premium of 25-45% over similarly qualified Mongolians with no English qualification.<sup>29</sup> This translates into a desire for more and more Mongolians to learn English at all ages. Surveys of consumers found that 91% of respondents were 'interested' in purchasing ELT from UK providers. There was a general feeling among interviewees that the ELT market in Mongolia has become increasingly saturated, and the low tuition fees expected from consumers, coupled with challenges in recruiting students, will make it challenging for new learning centres entering the market to be sustainable. Running a successful centre is made all the more challenging when considering the relatively expensive cost of hiring a foreign teacher (USD 1,000-1500 a month) and the challenges of recruiting and retaining qualified staff.

With this in mind, carrying out business partnerships that follow a B2B model may be more fruitful for UK ELT providers. Although American English is currently the preferred language of Mongolian public education, the government has demonstrated an openness to partnerships with UK providers to develop school curricula, as evidenced by the Cambridge International Initiative. One training provider we spoke to commented on the strong opportunity in partnerships with public education institutions, noting that public school training sessions would often attract over 200 attendees, compared just 20 attendees at private school training sessions.

Another interesting area for B2B cooperation is provision of training within Mongolia's mining industry. Many miners are contractually obliged to receive English training. However, as miners typically work 12-hour shifts, and many mining corporations lack a budget specifically set aside for such training, this is usually not implemented. Considering the economic resources of Mongolia's mining companies, a British company able to secure funding from a company to carry out such training could enjoy a good deal of success.

At the time of writing of this report, E-learning has yet to become a major trend within the Mongolian market. One educator we spoke to remarked that although their organisation has offered online courses for many years, there was minimal uptake, and those students who did sign up to classes were very unlikely to complete the whole course. According to the educator, this stems from cultural and habitual reasons, with Mongolians typically preferring to learn in an offline, face-to-face environment. However, as the country sees increasingly quick internet speeds and a more digitally proficient younger generation, it is possible that this attitude to online learning could shift in the future. Considering the remoteness of cities outside of Ulaanbaatar, and their relative dearth of language centres, online learning, if successful, could represent a huge opportunity to reach an untapped consumer base.



**Mongolians rarely (if ever) use online services due to cultural and habitual reasons. Although, with Internet speeds faster internet speeds and an innovative online education model, there could be room for growth.**

- Head of an ELT organisation in Mongolia

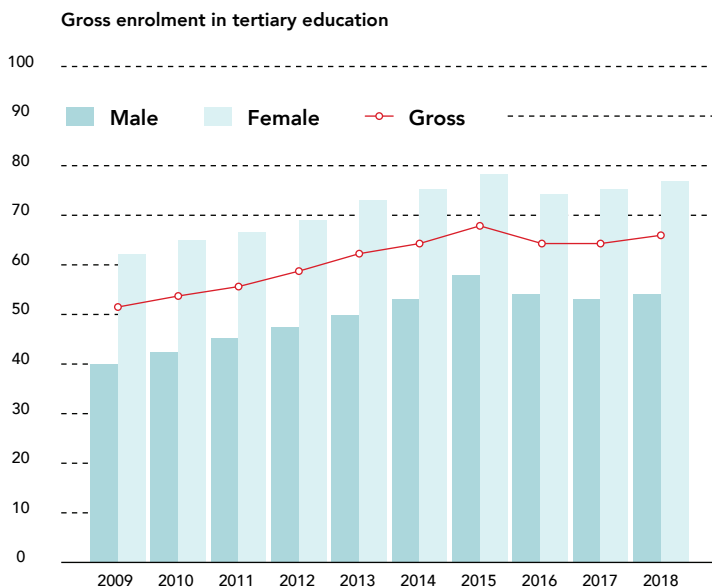
# 7 | Higher Education

## State of Sector

At present there are 96 higher education institutions in Mongolia and the higher education system currently has a student population of 155,000. Within this number of institutions, there are 18 public institutions, 75 private institutions and 3 international colleges. Of these 96 institutions, 89 are located in the capital Ulaanbaatar and the other seven are dispersed amongst the other aimags in Mongolia.<sup>30</sup> Despite private higher education institutions outnumbering public ones threefold, they were only home to 40% of the student population in 2017.<sup>31</sup>

Subject areas in high demand in Mongolia, as estimated by the Education Research Institute and the National University of Mongolia, are as follows:

1. Business administration
2. Marketing management
3. Accounting
4. Finance and economics
5. Computer science



Pressure on HEIs to keep affordable tuition has kept fees relatively low, with the average tuition fee for higher education amounting to around MNT 2.5 million (USD 1,000) a year for the 2017/18 academic year. Low tuition fees and underfunding have exacerbated issues surrounding the quality of Mongolian's higher education, simultaneously fuelling outbound student mobility to other countries with more developed higher education sectors.

Considering its relatively small population, Mongolia sees a high number of students studying abroad for higher education. UNESCO figures calculated that, in 2017, there were around 9,874 Mongolian students studying abroad, excluding those in Russia and China. In 2016, China reportedly hosted 9,900 students, while Russia hosted 5,500. Other major destinations include South Korea, Australia and the United States. In contrast, the UK accepted just 157 students in 2017/2018.<sup>32</sup>

## Policy environment

The number of Mongolian students studying abroad is aided by the high number of scholarship programmes available to students. These include government scholarships which cover accommodation and tuition in THE Top 20 globally ranked universities.<sup>33</sup> Students also enjoy a number of foreign government-funded scholarships, particularly from countries such as Russia and China.

There are a number of existing international partnerships being carried out with Mongolian HEIs in the form of both research and joint degree programmes. In 2017, there were around 40 joint/dual degree programmes offered at Mongolia's universities, with courses primarily taught in English.<sup>34</sup> Business studies courses, in particular, have seen strong growth in this area. Capacity building projects have also seen success at some of Mongolia's universities. One recent project, for example, saw six international universities, including the University of Essex, work with The Mongolian National University of Medical Sciences, Eeneral Medical Institute and Etugen University to develop an 18-month post-graduate diploma in mental health nursing. The programme has been funded by the European Union's Erasmus+ 'Building Capacity in Higher Education' programme.<sup>35</sup>

## Policy environment

Although the Mongolian government and international organisations have made major efforts to reform the country's higher education system, there still remains room for progress, including making accreditation mandatory for Mongolian HEIs, reducing the number of public institutions, and strengthening linkages between education, research, and business throughout the country.<sup>36</sup>

One major project in Mongolia's higher education reform is the Higher Education Reform Project (HERP), commissioned by the Asian Development Bank. The project is being carried out by the Ministry of Education, Culture, Science and Sports (MECSS) and is due to be finished in 2019. The total fund of the project is USD 20 million and aims to produce an improved, well-managed, equitable higher education system.

The project has aided in the promotion of scientific and technological research at universities, and led to the creation of 24 laboratories across six universities, the establishment of 10 internationally-accredited programmes and the training of 9,000 university staff members. The project also saw the establishment of five distance learning centres in Ulaanbaatar and five provinces, with the aim of expanding higher education outreach to at least 2,000 rural teachers and students.<sup>37</sup>

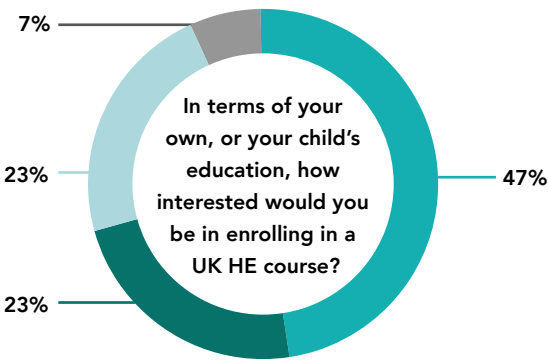
Other initiatives include the Mongolia Sustainable Development Vision 2030, which sets out to produce skilled graduates who can compete in international labour markets by 2030. Goals include attaining international recognition for Mongolian universities by having at least four universities ranked among the top Asian universities by 2025.<sup>38</sup>

With these objectives in mind the project encouraged active investment in the following areas:

- **Establishing a labour market information system**
- **Supporting program/curriculum development**
- **Strengthening national accreditation systems**
- **Achieving international accreditation**
- **Upgrading learning environments**
- **Faculty expansion and development**
- **Building research capacity**
- **Supporting HEIs to transform into entrepreneurial universities**
- **Increasing access to education**
- **Strengthening the higher education management information system**
- **Promoting gender equality in higher education**



## Opportunities and Challenges



UK higher education was hugely popular in the consumer survey, with 91% of respondents expressing some level of interest in enrolling in a UK HE course, and 60% of respondents stating they were 'very interested'. However, a primary concern brought up by educators was the high cost of UK education. This price sensitivity is reflected in the comparatively low number of Mongolian students enrolled in UK universities, despite their favourable perception of British higher education. For most Mongolian students, paying for 3 years of study without any form of bursary or scholarship is not possible.

University TNE partnerships offer a potential area for universities to capitalise on the positive perception of British higher education while keeping tuition fees more affordable for the general population. As illustrated above, a number of successful TNE partnerships are already underway in Mongolia. Considering the significant funding for the promotion of scientific and technological research, partnering in an area related to this field is more likely to receive support from the Mongolian government. Building research capacity in these fields is also a strong option.

UK higher education enjoys a strong reputation internationally, and is a global leader in areas such as accreditation and setting quality standards. Considering the government's recent focus on obtaining accreditation for its HEIs, as well as the efforts to bring Mongolian HE in line with international standards, working with Mongolian in developing standards and building capacity would have a significant impact on developing the country's HE infrastructure, and attract financial support from development organisations and the Mongolian government.

# 8 | Vocational and technical skills

## State of Sector

Mongolia's TVET education system was set up towards the end of the Socialist era in 1988, and like many other sectors, suffered severely during and after the transition to democracy in 1990. From 1990 up until the commodities boom of 2006-2008, TVET remained underdeveloped and underfunded, with the courses not reflecting the developments being made in the economy. The TVET learning programmes in place were heavily theory-focused and graduates had a reputation for being ill-equipped for the workplace.

As of 2016, there were 81 TVET institutions in Mongolia, of which 49 were private and 32 public.<sup>40</sup> Student enrolment in TVET institutions (public and private) had declined to 41,000 in 2016/17 from a high of 48,000 in 2011/2.<sup>41</sup>

In 2016, the top 5 most popular TVET industries in terms of course enrolment were services, construction, transportation, mining and health.

TVET courses were available in the following areas

### Industry

Plumbing  
Sanitation  
Baking  
Factory-based electrical management  
Industrial operations  
Industrial food production  
Dairy production

○ Construction

○ Transportation

○ Mining

Agriculture

Environmental services

Culture and art

○ Service

Information Technology

○ Health

Business and finance

Urban development

Education

## Policy Environment

Policies and objectives of the government of Mongolia have indicated the great deal of importance that the government attaches to the TVET sector, as well as the role that it can play in strengthening Mongolia's future workforce. In 'the Master Plan', the government of Mongolia set out 3 target objectives to significantly augment the country's TVET sector.

**These were:**

**to increase enrolment in TVET institutions by 56%**

**to improve the quality of technical education and vocational training in order to meet the demands of the labour market**

**to renew the management of TVET**

To meet these three objectives, and the wider aims for the TVET sector, 'the Master Plan' suggests providing 'favourable legal environment and policies to encourage foreign investment' in the TVET sector. Due to the favourable legal environment and policies and reforms across Mongolia's TVET sector, there has been considerable investment from multiple international organisations. Entities behind the projects include the German, Swiss and Australian governments, the Asian Development Bank, and the Millennium Challenge Corporation.

### Current and past projects include:

#### The Skills for Employment Project commissioned by the Asian Development Bank (ADB)

*Duration: May 2015 - May 2019*

*Amount: 29 million USD (USD 25 million ADB + counterpart financing by the Government of Mongolia USD 3.59 million)*

The objectives of the Skills for Employment Project were as follows:

- Establishment of an industry-driven TVET system in three priority sectors
- Increase partnerships between industry and TVET sector through partnerships
- Establish training systems for TVET managers and teachers and 30 independent senior secondary schools
- Develop a credit transfer system between senior secondary education, tertiary education, and TVET.

#### The Support to Mongolia's Technical and Vocational Education and Training Sector project commissioned by the European Union

*Duration: July 2014- June 2019*

*EUR 7 million*

This EU project aimed to support Mongolia's TVET sector and with it the economic development and human capital potential of the government and population. It aimed to achieve this by enabling key stakeholders to provide responsive and relevant training for a rapidly changing labour market.

#### The Cooperative Vocational Training in the Mineral Resource Sector commissioned by the German Federal Ministry for Economic Cooperation and Development (BMZ) in conjunction with the governments of Switzerland and Australia

*Duration: 2016-2019*

The objective of the BMZ commissioned initiative was to help Mongolian youth and adults make better use of employment opportunities in the labour market in the mineral resource sector, in both up- and downstream industries.

#### The Vocational Education Project commissioned by the Millennium Challenge Corporation

*2008-2013*

*USD 49 million*

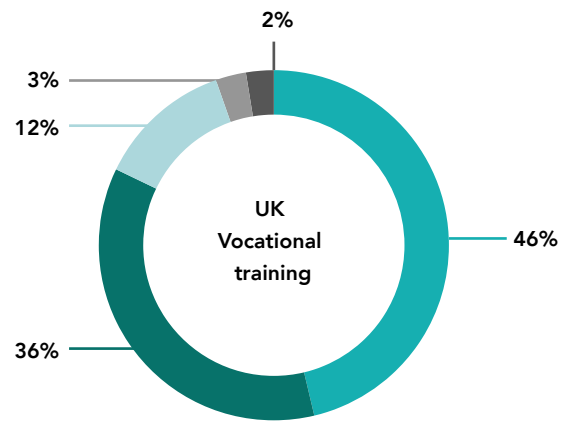
The Vocational Education Project formed part of a wider investment into Mongolia from the Millennium Challenge Corporation and aimed to reform policy and operational frameworks in Mongolia, implement professional development programmes for TVET instructors and update curricula based on competency- based training standards.

## Opportunities and Challenges

95% of respondents to our consumer survey expressed some level of interest in enrolling themselves or their child in a UK vocational training programme. Mongolia's government is committed to developing, reforming, and improving the country's vocational education systems and sees clear advantages in inviting foreign expertise and resources into the country to help achieve these aims. Training providers who enter the market can expect a favourable environment, with the freedom to implement training as they see fit.

Great efforts have been made to improve the infrastructure in Mongolia, and in particular in Ulaanbaatar, and these have created a new need for developing a highly-skilled workforce. One interviewee, for example, brought up an upcoming railway project which will create a need for training in areas such as signalling, solar power supply and electrical voltage training. As the project is to be built to international standards, using internationally recognised and standardised equipment and systems, input from outside TVET providers will be necessary.

Infrastructure projects, once completed, will also require ongoing training programmes for staff members and employees. For example, recent multi-million dollar electrification programmes will require the local workforce to be trained in skills related to maintenance. One interviewee remarked on the current low percentage of Mongolian electrical engineers who knew about the specifications in electrification, transmission and power plants. With regards to the mining industry, one respondent highlighted how huge levels of development and investment have resulted in the need to retrain and upskill in the mining field. In these areas, where skills now need to adhere to international standards, UK TVET providers could play an important role in setting up training programmes.



**There are currently huge projects underway for electrification across Mongolia, developing overhead lines, transformers... These will need maintenance, electricians. For all these big projects, the engineering and supply is coming from the outside - Mongolians have to be ready to handle all these electrical items.**

*- a professional involved in import and export in Mongolia*

# Summary of Opportunities

## Early years

- Working with public kindergartens to develop areas targeted by government plans, such as teacher training, provision of professional qualifications, and provision of teaching materials

## K-12

- Working with both public and international schools in Ulaanbaatar to develop sustainable teacher training programmes that can be carried out autonomously by schools
- Working with government to develop high-quality bilingual curricula that fall in line with international standards to be used at public schools
- Providing teaching materials and textbooks to Ulaanbaatar's numerous private bilingual schools

## ELT

- Providing training to staff at public schools in Ulaanbataar
- Working with public schools in Ulaanbaatar to implement high-quality English language curricula
- Working with major mining companies to provide relevant English language training to the mining workforce
- Using innovative approaches to cultivate a culture of online language learning in Mongolia's more remote towns and cities

## Higher Education

- Working with Mongolian universities in capacity building, and introduction and implementation of internationally recognised standards
- Partnering with Mongolian universities in research partnerships and affordable joint programmes in fields related to science and technology

## TVET

- Training of local workforce to internationally standardised construction practices, and maintenance of new infrastructure projects.
- Working with the government to develop vocational educational systems that align with internationally recognised standards
- Assist in the retraining and continued professional training of workforce in the rapidly developing mining industry

# Summary of Challenges

In our conversations and surveys with businesses in Mongolia, we asked for the three biggest challenges that they thought UK education businesses might face when entering Mongolia's market. A number of challenges were raised, but overall five overarching areas were commonly highlighted. In order of frequency of mention, these were:

## The high cost of UK education:

With an average monthly income of a Mongolian household of USD 414 at the end of 2018, UK education is prohibitively expensive for most people in the country. Companies looking to enter the market can either look to a limited customer base or have to seek ways to reduce costs for products and services.

## Differences in education style:

Differences between the Mongolian and British education styles may present challenges for Mongolian students wishing to transition from one to the other. Mongolia's national education system is modelled heavily on the traditional Soviet education system, which encourages rigid teacher-focused learning environments, as opposed to a British student-focused learning environment. There is a stated appetite for making this transition among many in Mongolia, but it may nonetheless prove challenging for both parents and students in practice.

## Staff Recruitment:

A number of factors make Mongolia a particularly difficult country to attract well-qualified foreign staff. Relatively low wages compared to other international destinations, combined with Mongolia's cold winters, low levels of internationalisation and winter air pollution in Ulaanbaatar, can make attracting and retaining highly-qualified international staff challenging.

## Low English levels:

Although a growing number of schools have begun to adopt a bilingual English-Mongolian curriculum, the general standard of English among most Mongolian citizens is still relatively low. This proves challenging for businesses attempting to carry out business in the country, and will require that UK organisations provide bilingual options, particularly in areas such as vocational training.

## Small size of market:

With a population of just 3.2 million, Mongolia is one of the least populated countries in Asia. This, factored with the lack of accessibility to the nomadic population in the steppes and those in smaller cities, means that the number of potential students and companies UK businesses can work with is relatively limited. Companies may struggle to make a return on investment in the short term.

# Summary of Challenges

In addition, through our desk research, experience on the ground and further conversations with businesses, we came across several other challenges which might be relevant for UK business in Mongolia. These were:

## Last minute culture:

Several interviewees referred to the prevalence of 'last-minute culture' in Mongolia. Although local companies are typically able to meet deadlines and carry out projects successfully, the last-minute nature of execution may prove challenging for UK organisations who are unaccustomed to this style of business.

## Competition with other education systems:

Although UK education is very well regarded, other countries have thus far made further inroads into the market. Australia and the United States have had more success in attracting Mongolian students in higher education, while the German, Swiss and Australian governments have already invested heavily in the country's vocational training sector. UK companies entering the market will have to deal with strong competition and a relative lack of familiarity among Mongolian consumers.

## Facilities and resources:

Although Mongolia has seen significant development in recent years, the country still has a relatively underdeveloped infrastructure, particularly outside of Ulaanbaatar. Difficulties with facilities and resources, such as limited rail links and slower Internet speeds outside Ulaanbaatar risk hindering businesses operating in the country.

## Development mindset:

Since its transition to a market economy, Mongolia has received considerable aid investment from international organisations such as the World Bank, the Asian Development Bank and the Millennium Challenge Corporation. Though this development has had a positive impact on the country's infrastructure, some companies are unaccustomed to purchasing products and services at international business rates.

## Population distribution:

Mongolia's land mass is six times larger than the UK's, while its population is 20 times smaller. As a result, there is considerable distance between many of Mongolia's major urban centres combined with the relatively low population numbers in each of Mongolia's urban centres outside of Ulaanbaatar, means that organisations wishing to develop business networks beyond the capital would need to carefully consider the impact of logistics on any potential economic return.



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## Fees / per year (MNT/million)

Name of the school	Primary School	Middle School	Senior School	Name of the school	Primary School	Middle School	Senior School
New Mongolia School	1st Grade: 4.2	4.5	4.7	International School of Ulaanbaatar	51.8	60.1	66.1
Genesis School	3 – 3.3 million MNT			Shildeg School	3.9 – 4.7		
Orchlon International School	18	21	23	Ikh Zasag International School	3.2 – 3.5		
New Era International Laboratory School				Leader High School	1.5 – 1.97		
The English School of Mongolia	12.5	12.75	13	Uygii School	2		
Hobby School	8.5	9.5	10.1	Radhaga School	2.6		
Olonlog School				Nomin Naran School	4 – 4.5		
Sant School	1st Grade: 7	0,5		American School of Ulaanbaatar	14.3	18.7	22
Empathy School				Gurujiin School	1.8		
Goethe School	5			Arrival School	2.4 – 3.2		
Tolol School	3 – 3.25			Sen Lise School	2.3 – 2.7		
Academic Perfect School	3.8			New Zuun Bile Secondary School	3.8 – 4.5		
Oyunii School				Nomuun School	2.8		
Bright Future School	2.3 – 3.5			Es Erdem School	1.98		
Sakura School	7.5	8.5	9.5	Oyu Tolgoi School	3.5		
Romashka School				Oyuuny Onis School	3		
New Generations School	2.2 – 2.6			Reflection High School	1.69 – 1.79		
Perfect Diversions School	2.4	2.6	2.8	Giant School	0,75		
Khishig School	2.8	2.25	2.25	Putokanhua School	3.5		
Atlanta School	2.5	3	3	Intellectual Buds School			
Logeriti School	5.4	5.5	5.5	Jargalan International School	3.6		
Bullehur Secondary School	2.1 – 2.5			Erdmiin Mine Elementary School			
Ulaanbaatar High School	3			Tugsbilig Primary School	2		
Russian School of Excellence	3.4			Shine Mongol Harumafuji School	4.8		
Elite International School	9.95	11.35	11.3	Singapore School of Mongolia	3.5 – 5		
British School of Ulaanbaatar	26.8	37.5 - 40.1	51.6				



This report was researched and written  
by Venture Education.

Venture Education is a Beijing-based consultancy that empowers UK education in Asia. We do this through research, projects and consultancy. Our team is a mixture of former teachers, university lecturers, education professionals, research analysts and project leaders from the UK and Asia. We are always open to new projects, we love to make ideas happen, and we care about what we do. To read more of our research reports, or learn more about our market entry consultancy services, please get in touch.

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