

Mapping the Higher Education Landscape in Sri Lanka

Presenting the Results of the LIRNEasia Survey of Undergraduate Degree Programs

Sujata N Gamage
Tilan M Wijesooriya
Human Capital Research Program
LIRNEasia



□ MISSION

To improve the lives of the people of the emerging Asia-Pacific by facilitating their use of ICTs and related infrastructures; by catalyzing the reform of laws, policies and regulations to enable those uses through the conduct of policy-relevant research, training and advocacy with emphasis on building in-situ expertise.

- HUMAN CAPITAL RESEARCH PROGRAM at LIRNEasia explores new approaches to human capital development by mapping and analyzing the state of education, training and knowledge production in developing Asia and identifying ways of using ICTs and knowledge networks to fill the gaps



Higher Education Landscape in Sri Lanka



Context

Developed Countries

- Private investment in higher education are minimal because they are able to mobilize public and philanthropic resources for higher education

E.g., 4,634 universities & colleges in USA in 2010 enrolled 20.6 million students in 2 or 4 year higher education programs with enrollments distributed as:

Public	70%
Non-Profit	20%
Private	10%

(www.webcaspar.nsf.gov)

- Private inputs in the form of student fees typically cover about 1/3 of the income of a typical public higher education institution



Context

Developing Countries

- Private investments/inputs have been mobilized out of necessity

China: Since 1997, public universities have been allowed to recover 25% of operating costs through fees

India: Since the 2003 Act for the 'Establishment of and Maintenance of Standards in Private Universities', 107 private universities have been established, bringing the percent of private universities to 14%.

Bangladesh: Since the 1992 Private Higher Education Act private institutions has risen to 62% of the total



Context

Sri Lanka

- Private investments and inputs are here, with or without mobilization

World Bank estimates Gross Enrollment Rate in higher education in 2006/2007 for the relevant age group to be 21%.

4% public universities and advanced technical colleges (73,491)

12.2% external degree programs (225,208)

2.5% private institutions (45,700)

1.5% Open University (28,569)

0.4% Post graduate institutes and other (9,015)



Our research

- Aims to fully map the higher education landscape to
 - Understand the dynamics and publish research papers, policy briefs etc.
 - Share the results with parents, students and the public to better inform them
 - Change their mindset, if possible

- Define the Higher Education Landscape as consisting of:
 - Undergraduate degrees
 - Post-graduate degrees and professional charters
 - Foundation diplomas



Target Audience & Guiding Principles

- ❑ Students and Parents
Accuracy, comprehensiveness and ease of use
- ❑ Educational Institutions
Fairness in reporting; being a source of market information
- ❑ Researchers
Making information available for further research
- ❑ Policymakers
Being proactive in briefing



Method

□ Scope

This survey covers all HEIs that offer undergraduate degree programs (includes 3 professional qualifications; excludes CIMA and some others at this stage)

□ Survey Universe

14 Public Universities and 3 Institutions
(ugc.ac.lk)

56 other HEIs

(Source: previous survey by LIRNEasia and advertisements in *Sunday Observer* and *Sunday Times* during 9-23 Oct 2011)

□ Respondents

Officials such as CEOs, chairmen, presidents, directors of studies, registrars, and marketing managers were contacted and the purpose of the survey was explained.



Method

□ Questionnaire

degree program name, duration, cost, board of study, graduate output (2008-2010).

To reduce the reporting burden and to reduce inconsistency in reporting, we did not seek information about enrollment and other

□ Data Collection

The survey documents were emailed to 55 HEIs and snail mailed to 01 institutes in December of 2011. Data collection completed by March, 2012.



Higher Education Landscape

ideal

There are choices in higher education

- for every child
- for every pocket book
- with second or third chances
- at any point in one's life



Higher Education Landscape

7 Guideposts

1. Type choices in the type of institution
2. Control who can intervene
3. Legitimacy of degree awarding authorities
4. Maturity track record
5. Fields of Study what to study
6. Size size of the student body
7. Cost fit to pocket



Two of the Guide Posts can serve as 'starter' indicators of quality suitable for an evolving sector

- Legitimacy of the board of study
or whether the degree awarding body is accredited for the purpose
- Track record of the institution
or success of the institution in producing graduates

* Degree awarding body



1-Types of HEIs

we define three using a student perspective

□ Public-UGC (17)

HEIs that are fully funded by the state and managed under government regulations, with admissions controlled by the University Grants Commission

□ Public-Non-UGC (10)

HEIs that are fully or partly funded by the state and managed with varying levels of independence from the respective government, authorities, but admission criteria determined independently of the UGC

□ Private (46)

Privately owned. Can be for-profit or non-profit

Aquinas and SLIIT are non-profit institutions . So are SLIA and ICC.

2-Control

Public HEIs

- ❑ Ministry of Higher Education: 14 universities, 3 institutes and The Open University of Sri Lanka
- ❑ Ministry of Defense: General Sir John Kotelawala Defense University (KDU)
- ❑ Ministry of Education: National Institute of Education
- ❑ Ministry of Higher Education/University of Colombo: Institute for Agro-Technology and Rural Sciences; Institute of Human Resource Advancement
- ❑ Ministry of Skills Development and Youth Affairs: National Institute of Business Management (NIBM); Ocean University of Sri Lanka; University of Vocational Technology
- ❑ Ministry of Social Work: National Institute of Social Development (NISD)
- ❑ Department of Surveys: Institute of Surveying and Mapping

3-Legitimacy

Public-UGC (17)

Boards of Study	legitimacy
Same as the institutions offering the programs	<p>14 Public-UGC institutions are universities authorized to award degrees by respective acts of parliaments</p> <p>3 institutes are affiliated with universities</p>



3-Legitimacy

Public Non-UGC (10)

Boards of Study	legitimacy
Same as the Institutions offering the program or parent body	<p>2 award degrees from their parent university (IAT, IHRD at the University of Colombo)</p> <p>5 are authorized by acts of parliament to award their own degrees (NIE, KDU, Ocean University, Open University, UNIVOTEC)</p> <p>3 are authorized by UGC to award certain specific degree (ISM, NIBM, NISD)</p>



3-Legitimacy

private institutions

Boards of Study	legitimacy
Foreign institutions (49)	<p>44 foreign institutions are members of the International Association of Universities (IAU) or the Commonwealth Association of Universities (CAU)</p> <p>4 are not members of but recognized by authority in country or origin</p> <p>1 is governed by an intergovernmental board (AIT)</p> <p>(SLIIT and Aquinas have awarded degrees under the authorization by UGC)</p>



4-Maturity/Track Record

	Public -UGC	Public- Non-UGC	Private	All
Awarded Degrees	16	9	27	52
Enrollments only	1	1	17	19
New Programs	-	-	2	2
ALL	17	10	46	73

- Awarded Degrees: 27 private institutions have a track record of having awarded one or more degrees in 2010 or 2011; Altogether 52.
- Enrollments Only: 19 have enrollments only; Of these two are public institutions (Swamy Vipulananda Institute (; IATRS and 15 Private
- New Programs: Northshore College of Business and Technology and Western



5-Fields of Study

number of programs by type of institution per field of study

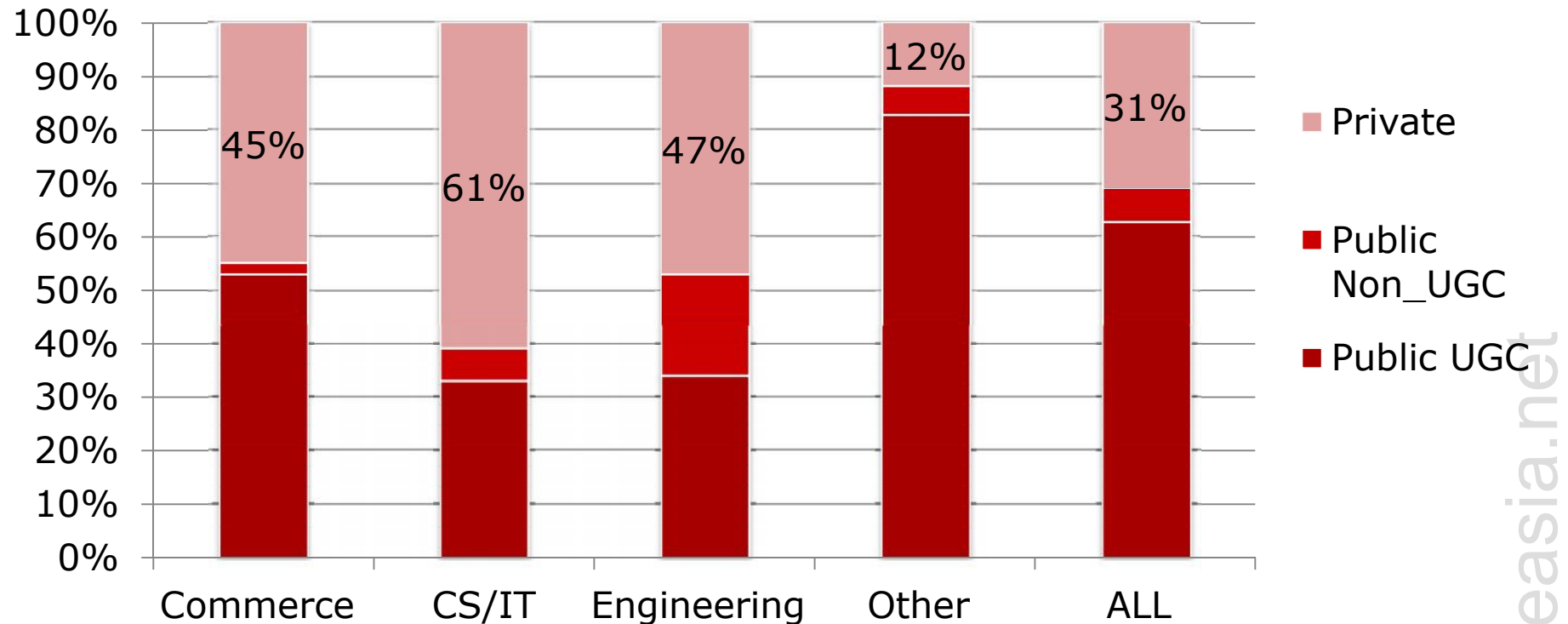
	Public UGC	Public Non_UGC	Private	All
Commerce	90	4	77	171
Computer Science/IT	34	6	63	103
Engineering	23	13	32	68
Other	288	18	40	346
ALL	435	41	212	688

- Private sector dominates Computer Science/IT offerings with 66/103 programs, but only 40/346 in the 'Other' Category



5-Fields of Study

percent distribution of programs by type of institution and field of study



- Private sector dominates Computer Science/IT offerings 61% of total, but only 12% of the total in the 'Other' Category

5-Fields of Study with Track Record

number of programs by type of institution per field of study

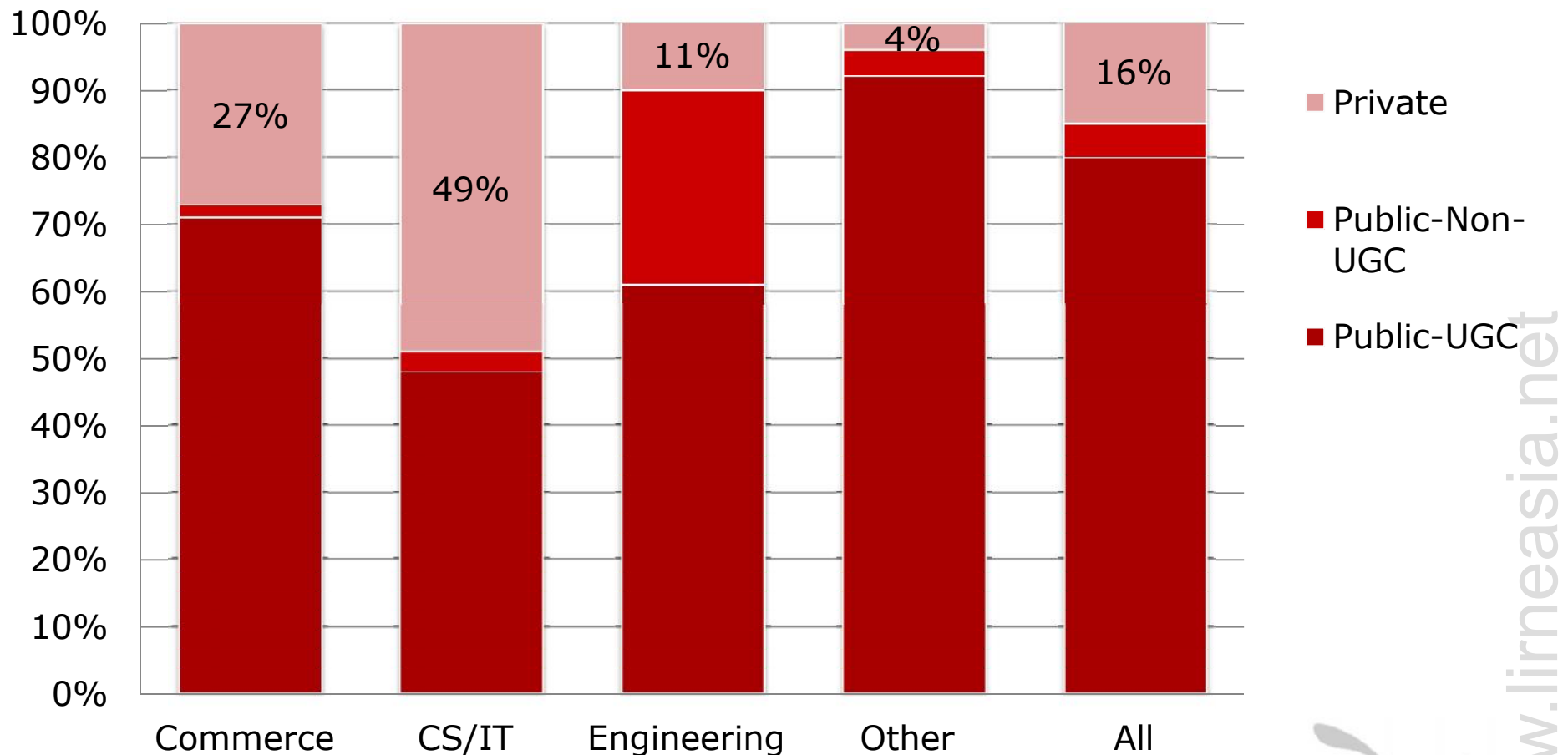
	Public UGC*	Public Non_UGC	Private	All
Commerce	90	2	34	126
Computer Science/IT	34	2	35	71
Engineering	23	11	4	38
Other	288	12	13	313
	435	25	86	546

- Engineering: General Sir John Kotelawala Defence University (KDU), 6; Institute of Surveying and Mapping* 1; Ocean University of Sri Lanka, 1; The Open University of Sri Lanka, 2; University of Vocational Technology, 1
- Assumed all Public-UGC programs to have track record



5-Fields of Study with Track Record

percent distribution of programs by type of institution and field of study



5-Fields of Study

Classification of institutions by the diversity of fields offered

Type Institution	Public-UGC	Public-Non-UGC	Private
Commerce only	-	-	4
Computer Science/IT only	-	1	8
Commerce/Computer+	-	1	18
Specialized	4	6	12
Wide-Range	13	2	4

- Multiple fields of study are offered only by
 - 13 public universities
 - 2 Public-Non-UGC institutions (KDU and Open University)
 - 4 Private institutions (Aquinas College of Higher Studies; Gateway Graduate School; Royal Institute of Colombo; Spectrum Institute of Science and Technology)

Higher Education Landscape

7 Guideposts

1. Type choices in the type of institution
2. Control who can intervene
3. Legitimacy of degree awarding authorities
4. Maturity track record
5. Fields of Study what to study
6. Size what is size of the student body
7. Cost fit to pocket



Guide-posts for Policymakers and Researcher



Graduate Output

by field of study and type of institution (total = 19,599)

	Public-UGC	Public-Non-UGC	Private	All
Commerce	2,679	143	867	3,689
Computer Science/IT	429	144	1,552	2,125
Engineering	1,195	221	71	1,487
Other	8,301	3,721	243	12,265
ALL	12,604	4,229	2,733	19,599

- ❑ CS /IT: 73% (or 1552/2125) by Private insts
- ❑ Commerce: 24% by private insts; 73% by public-UGC insts
- ❑ Other: 2% by private insts;
3000/4229 by Public-Non-UGC are awarded by NIE to teachers
- ❑ Engineering: 6% only by Private sector; lack of demand or cost?



Graduate Output

2008 - 2010

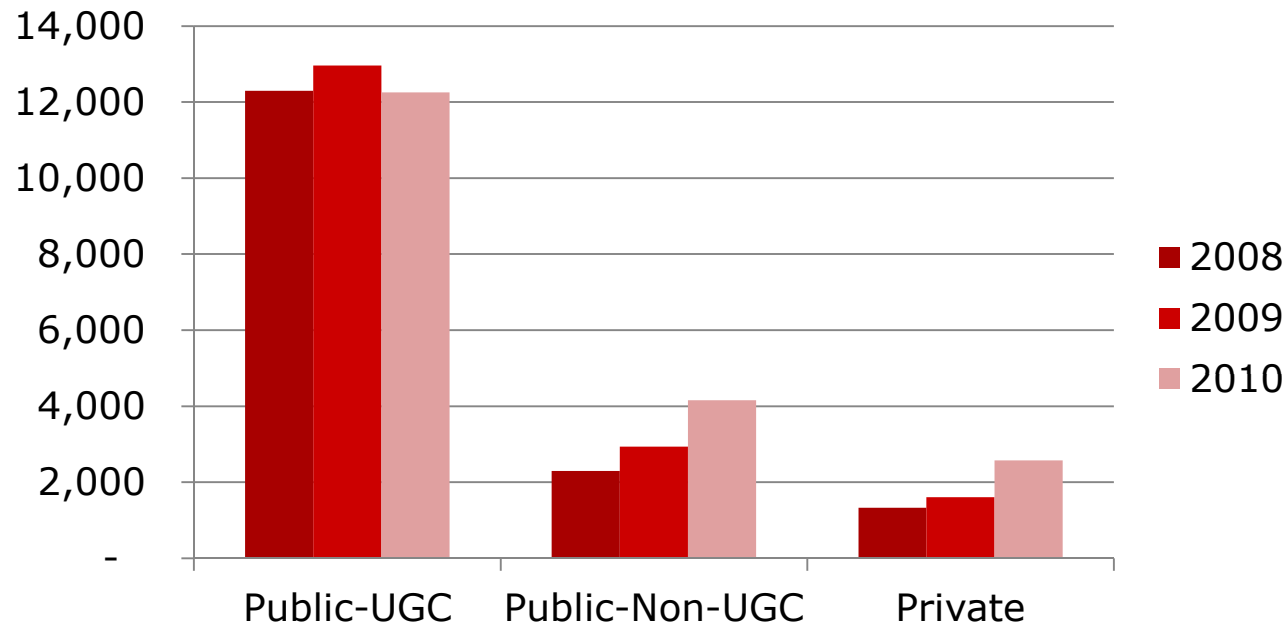
	Public UGC	Public Non-UGC	Private	ALL
2008	12,296	2,296	1,331	15,923
2009	12,963	2,935	1,608	17,506
2010	12,257	4,158	2,574	18,989

- Total graduate output increased at 10% in 2009 and 8% in 2010
- Increases came from the alternative to the Public-UGC system
- Output from Public institutions have stabilized. Good thing?



Graduate Output

2008-2010



- Graduate output from Public institutions have stabilized while output from semi-public and private output has increased



Professional Qualifications

output 2010/11, incomplete list

	Details	Total
COMMERCE	770 (CIMA); 179 (CIM)	949+
COMPUTER SCIENCE /IT	220 (BCS)	220+
ENGINEERING	NA	NA
OTHER	22 (SLIA); ICC (70)	92
ALL		1,261+

- CIMA Chartered Institute of Management Accountants
- CIM Chartered Institute of Marketing
- BCS British Computer Society – Chartered Institute for IT;
- SLIA Sri Lanka Institute of Architects , higher diploma;
- ICC Institute of Chemistry Ceylon, Graduateship



Professional Qualifications

Degree Equivalents/Comparables

	Details	Total
COMMERCE	770 (CIMA); 179 (CIM)	949
COMPUTER SCIENCE /IT	220 (BCS)	220
ENGINEERING	NA	NA
OTHER	22 (SLIA); ICC (70)	92
ALL		1,261+

- BCS, SLIA are recognized by UGC as qualifications for post-graduate studies; More such articulations between UGC and Professional Institutes are needed
- Many ICC graduates have returned to the country after completing PhDs



Higher Education Landscape in Sri Lanka

how does it look?

- Alternatives to the UGC-mediated public university system have emerged and they are of :
 - Sufficient legitimacy
 - Sufficient maturity
- These alternatives accounted for 36% of the 19,599 graduates produced per annum in Sri Lanka in 2010/2011
- The alternatives offer 253 degree program and several degree equivalents
- The public has no maps to guide them
- LIRNEasia's directory of degree programs can be a start



**Launching the Web site at
SL2COLLEGE.org**

Presenting the Directory



SL2College is a global community of young Sri Lankan expats who provide FREE advice and guidance to Sri Lankan students. They strive to provide unbiased and informative answers to questions posted by students wanting to pursue higher education.

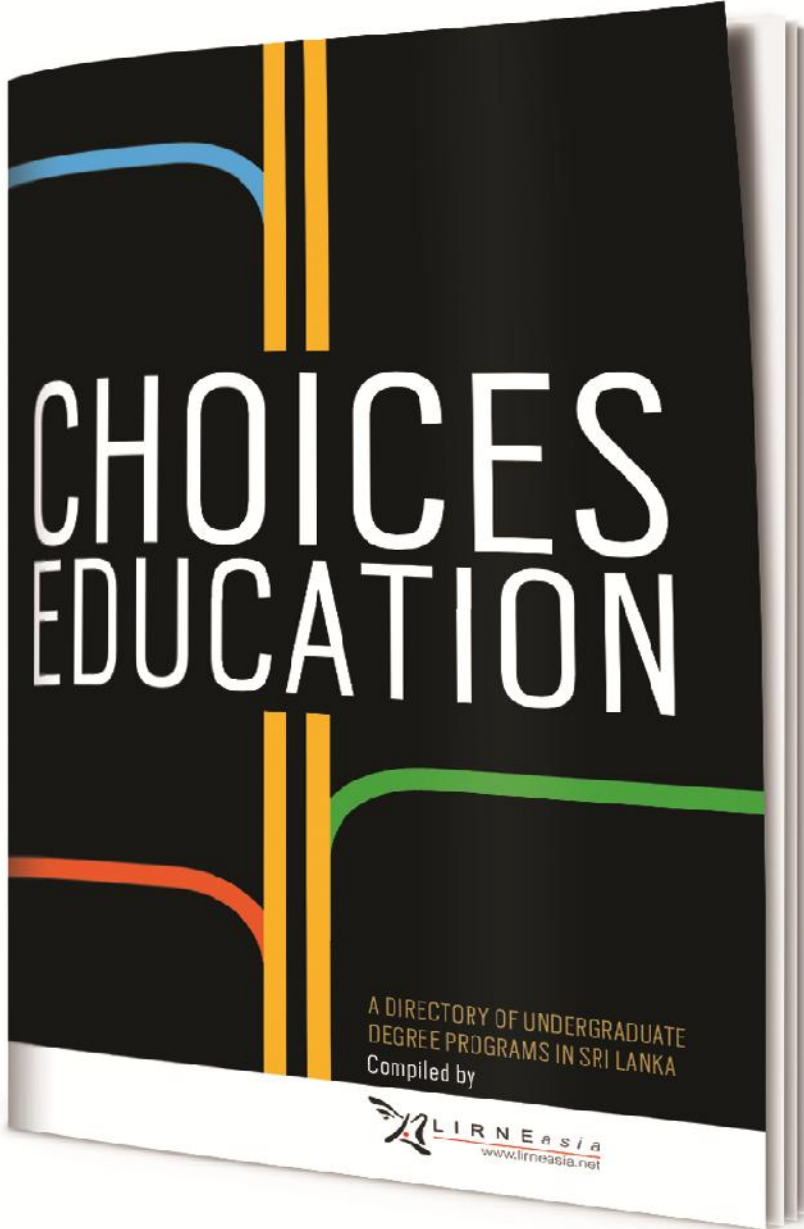


Web Interface at <http://www.sl2college.org/hei-survey/>

The screenshot displays the SL2College HEI Survey web interface. The browser window shows the URL www.sl2college.org/hei-survey/. The page features a navigation menu with links for SL2College, About HEI Survey, Programs, Institutes, and Our Forum. A filter section allows users to filter programs by Field of Study, Specialization, Program, Institute, and Board of Study. The main content area displays a table of programs with the following columns: Field of Study, Specialization, Program Name, Institute, Board of Study, Length, and Cost.

Field of Study	Specialization	Program Name	Institute	Board of Study	Length	Cost	
E	Commerce	Accountancy	Bachelor Of Commerce (Accounting)	University of Ballarat Sri Lanka Study Centre	University of Ballarat Australia	3 Years	Greater than 1 Million
E	Commerce	Accountancy	BBS Accountancy	GISM - Graduate Institute of Science & Management	Massey University New Zealand	3 Years	200000-499999
🎓	Commerce	Accountancy	BSc Accounting and Finance	Royal Institute of Colombo	University of London UK	3 Years	Greater than 1 Million
🎓	Commerce	Accountancy	BSc Accounting with Law	Royal Institute of Colombo	University of London UK	3 Years	Greater than 1 Million
E	Commerce	Accountancy	BSc applied accounting	Cosmopolitan College of Business and Technology (CCBT)	Oxford Brookes University UK	Less than 3 Years	200000-499999
🎓	Commerce	Accountancy	BSc Applied Accounting	Mercury Institute of Management	Oxford Brookes University UK	2.5 Years	200000-499999
🎓	Commerce	Administration/Management/Business Studies	BA (Hons) Business Administration	Asia Pacific Institute of Information Technology (APIIT)	Staffordshire University UK	3 Years	Greater than 1 Million
★	Commerce	Administration/Management/Business Studies	BA (Hons) Business Management	Asia Pacific Institute of Information Technology (APIIT)	Staffordshire University UK	3 Years	Greater than 1 Million
🎓	Commerce	Administration/Management/Business Studies	BA (Hons) Business & Management Studies	International College of Business & Technology (ICBT)	Cardiff Metropolitan University UK	3 Years	500000-999999
★	Commerce	Administration/Management/Business Studies	BA (Hons) Business and Management	British School of Commerce	London School of Commerce UK	2 Years	500000-999999

At the bottom of the page, there is a pagination control showing "1 of 26" and "Programs per page: 10". The page was processed within 0.237 seconds.



LIRNEasia Directory of Undergraduate Degree Programs

FIELD OF STUDY
Specialization
Output/Enrollments
Duration, Cost
Degree awarding authority



Commerce

specializations (19)

Programs with Track Record	Accountancy; Business Administration/Management; Economics/Finance; Engineering/Technology Management; Hospitality/Tourism Management; Human Resource Management; International Business; Management With Law; Marketing
No Track Record	Agri-Business; Communication Management; Entrepreneurship & Small Business; Event & Venue Management; Healthcare Management; Information Systems; Logistics; Retail Management; Sports Management; Valuation & Property Management

- 9 Specializations have graduate output



Computer Science/IT specializations (11)

Programs with Track Record	Business information technology; Computer networking; Computer systems; Computing/computer science; Information Systems; Information technology; Internet technology; Multimedia; Software Engineering
No Track Record	Database administration and management Information science

- ❑ 9 Specialization have graduate Output



Engineering

Specializations (12)

Programs with Track Record	Aeronautic/Aerospace Engineering; Civil Engineering; Electrical & Electronic Engineering; Industrial Engineering; Marine Engineering; Mechanical Engineering; Quantity Surveying/Construction Management; Technology
No Track Record	Automotive Engineering; Engineering, General; Environmental Engineering; Offshore Systems Engineering

- 8 Specializations have graduate output



Other

'Specializations' (12)

Programs with Track Record	Architecture; Design; Development Studies; Education; Humanities/Social Sciences; Law; Nursing; Psychology; Science
No Track Record	Agriculture; Media & Communication; Medicine And Surgery

- 8 Specializations have graduate output



Output / Enrollments (2010/2011)

number of institutions, by size and type of institution

Size (graduate output)	Public-UGC	Public-Non-UGC	Private
500 Or more	8	2	1
100-499	7	1	13
21-99	2	6	18
20 or less	-	1	12
New	-	-	2

- Graduate outputs of more than 500 are found in only one private institution. Most private institutions have outputs of 20 or less, 21-99 or 100-499 per year.



Output/Enrollments (2010/2011)

public-UGC institutions

1.	University of Colombo	2320
2.	University of Peradeniya	1963
3.	University of Sri Jayewardenepura	1770
4.	University of Kelaniya	1442
5.	University of Ruhuna	1228
6.	University of Moratuwa	899
7.	Swamy Vipulananda Institute of Aesthetic Studies	700
8.	Sabaragamuwa University of Sri Lanka	585
9.	University of the Visual & Performing Arts	452
10.	University of Jaffna	446
11.	Rajarata University of Sri Lanka	346
12.	Wayamba University of Sri Lanka	285
13.	Uva Wellassa University	148
14.	Eastern University, Sri Lanka	124
15.	Gampaha Wickramarachchi Ayurveda Institute	115
16.	Institute of Indigenous Medicine	93
17.	South Eastern University	41

❑ Institutes in maroon have student enrollment only



Output/Enrollments (2010/2011)

public-non-UGC institutions

1.	National Institute of Education (NIE)*	3,000
2.	The Open University of Sri Lanka	698
3.	National Institute of Business Management (NIBM)	232
4.	Institute of Human Resource Advancement (IHRA)	88
5.	Ocean University of Sri Lanka (Ocean U)	71
6.	General Sir John Kotelawala Defence University (KDU)*	66
7.	Institute for Agro-Technology and Rural Sciences*	40
8.	The National Institute of Social Development (NISD)	29
9.	University of Vocational Technology*	27
10.	Institute of Surveying and Mapping*	18

❑ *Public institutions for which admissions are not mediated by the UGC, but enrollments are restricted to special categories such as army personnel, teachers, surveyors and those holding National vocational Qualifications (NVQ)

❑ Institutes in maroon have student enrollment only



Output/Enrollments (2010/2011)

private institutions, set 1

1. Sri Lanka Institute of Information Technology (SLIIT)	719
2. IDM Computer Studies (Pvt) Ltd	415
3. South Asian Institute of Technology and Medicine (SAITM)	202
4. Regent International Institute for Higher Studies (RIIHS)	200
5. Business Management School (BMS)	200
6. Asia Pacific Institute of Information Technology (APIIT)	190
7. Auston Institute	144
8. Informatics Institute of Technology (IIT)	140
9. ESOFIT Computer Studies (Pvt) Ltd.	140
10. Australian College of Business & Technology (ACBT)	132
11. CFPS Academy of Legal Studies	126
12. Colombo Institute of Research and Psychology	120
13. Matrix Institute of Information Technology	105
14. Royal Institute of Colombo*	100

❑ Only a few are located outside of Colombo: BCLS-Wattala; IHS-Welisara; RIHS-Gampaha

❑ Institutes in maroon have student enrollment only



Output/Enrollments (2010/2011)

private institutions, set 2

15. Colombo International Nautical & Engineering College (CINEC)	80
16. International College of Business & Technology (ICBT)*	75
17. Singapore Informatics	73
18. Academy of Design (AOD)	71
19. College of Chemical Sciences (CCS)	70
20. International Institute of Health Sciences (IIHS)	69
21. American National College / ANC Education	56
22. Mercury Institute of Management	45
23. Lanka Institute of Fashion Technology (LIFT)	40
24. Imperial Institute of Higher Education	31
25. Gateway Graduate School	30
26. University of Ballarat Sri Lanka Study Centre	29
27. Cosmopolitan College of Business and Technology (CCBT)	28
28. American College of Higher Education	27
29. Brandix College of Clothing Technology	25
30. City School of Architecture	22
31. Pioneer Institute of Business and Technology (PIBT)	20
32. AIMS College of Business & IT	20

❑ Institutes in maroon have student enrollment only

Output/Enrollments (2010/2011)

private institutions, set 3

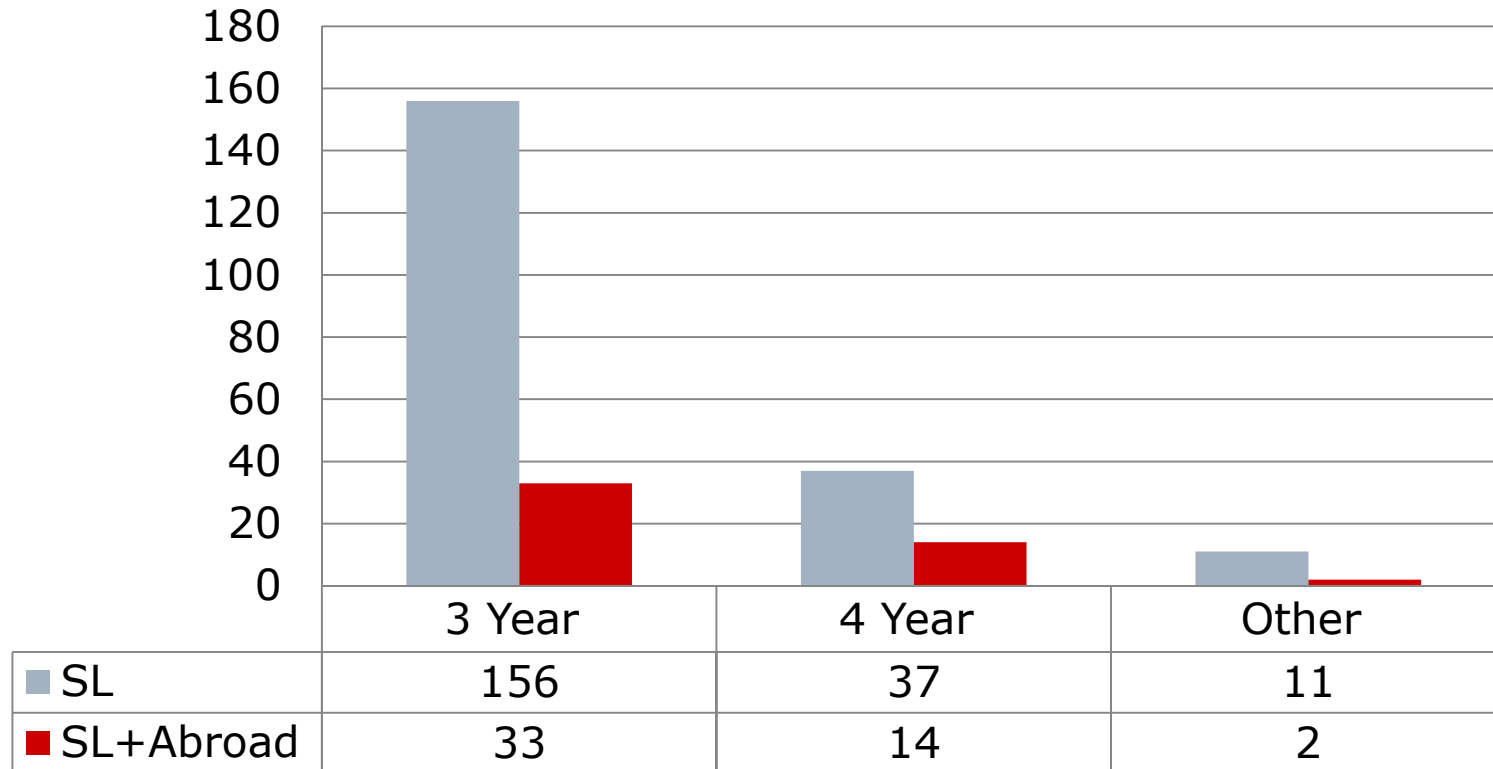
33. GISM - Graduate Institute of Science & Management	17
34. Londontec City Campus	16
35. OpenArc School of Business and Technology Ltd	16
36. Colombo School of Construction Technology	15
37. Spectrum Institute of Science and Technology (Pvt) Ltd	12
38. Aquinas College of Higher Studies	09
39. Asian Aviation Centre	08
40. Oxford College of Business	07
41. British College of Legal Studies (BCLS)	not provided
42. Horizon Campus	not provided
43. London Business School (LBS)	not provided
44. British School of Commerce	not provided
45. Northshore College of Business and Technology	new
46. Western College for Management & Technology	new

❑ Does not include: ICFAI Education Lanka Campus - Curtailing operations; PATHE Academy – presently not offering undergraduate programs; Thesaurus Computer Center - presently not offering undergraduate programs; Institute of Technological Studies (ITS) - Not in operation / closed

❑ Institutes in maroon have student enrollment only

Duration

number of degree programs by length of study

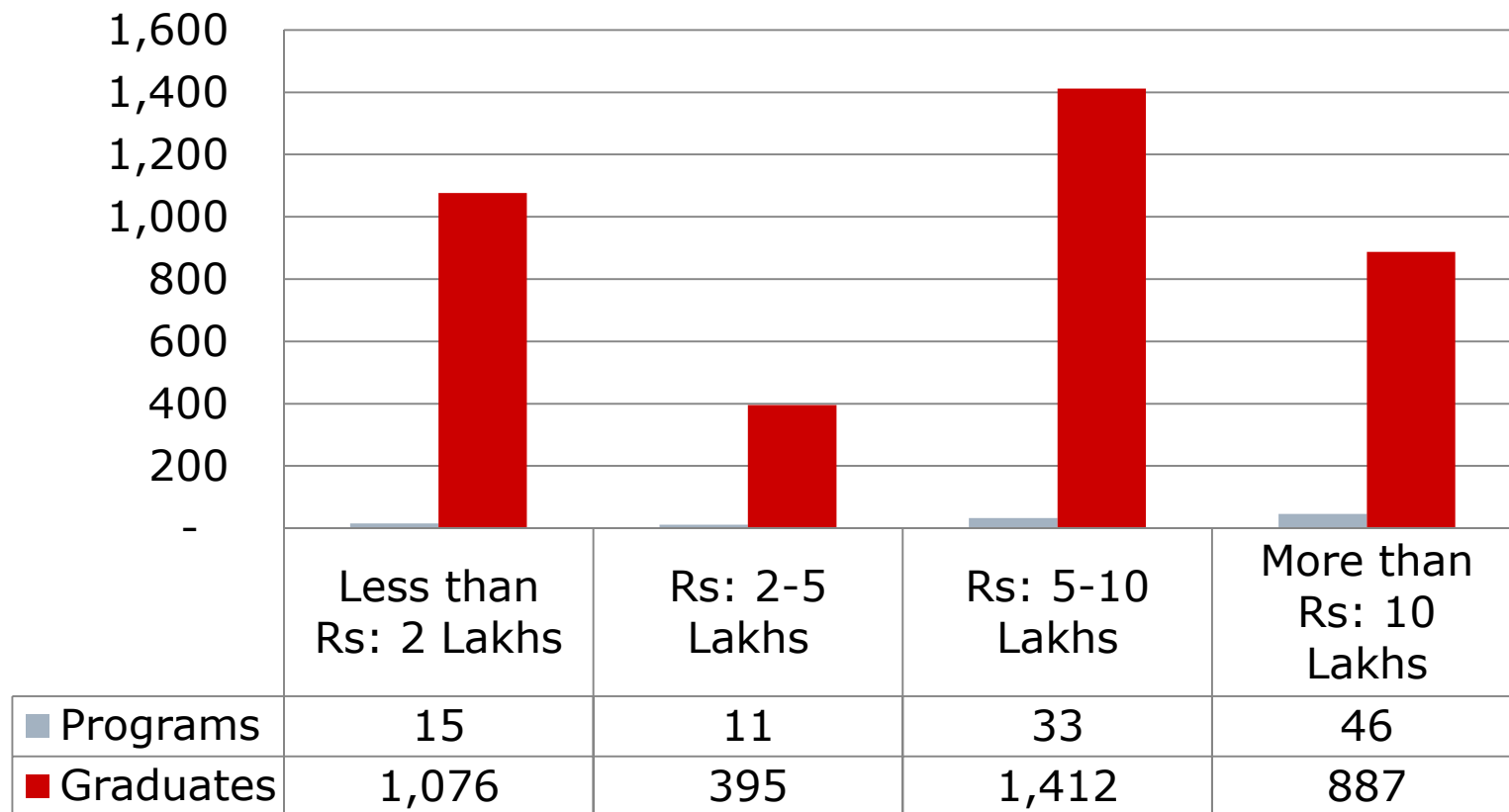


- 75% of programs are of 3-Year duration (189/253)
- 19% of programs have a study abroad component (49/253)



Demand v. Cost

graduate output is used as a proxy indicator of demand



- More programs are available at higher prices
- Demand seem to have no relation to cost with programs costing more than Rs: 10 Lakhs have an output of 887 while programs costing Rs: 2-5 Lakhs have an output of 395. Also Programs costing Rs: 5-10 Lakhs have more output than programs costing Rs: 2-5 Lakhs.

Foreign Boards of Study (BoS)

Country	Number BoS	Number of Programs	Number of Programs with Track Record	Graduate Output of Programs
Britain	24	121	62	1333
Australia	7	17	5	253
USA	6	15	10	103
Malaysia	4	7	-	-
India	4	12	5	215
New Zealand	2	26	-	-
Thailand	1	1	-	-
China	1	1	-	-
Ireland	1	2	2	232
ALL	50	202	89	2136

- ❑ Programs under British BoS have greater share 60% (121/202); Graduate output from British programs also account for 62% (1333/2136)



**LIRNEAsia deeply appreciates the
support of the
Ceylon Chamber of commerce
In organizing this event**

**Thank you all for your participation
Please continue to send us your
feedback**



Sri Lanka

Year of A/L Exam	No. Sat GCE(A/L)	No. Satisfying Min Requirements	No. Applied	No. Selected	Selectivity
2006	201,686	119,955	36,465	17,248	47%
2007	198,183	121,421	38,603	20,069	52%
2008	207,436	130,236	46,010	20,270	44%
2009	205,249	125,284	47,613	21,547	45%
2010	233,609	142,516	54,124	22,016	41%

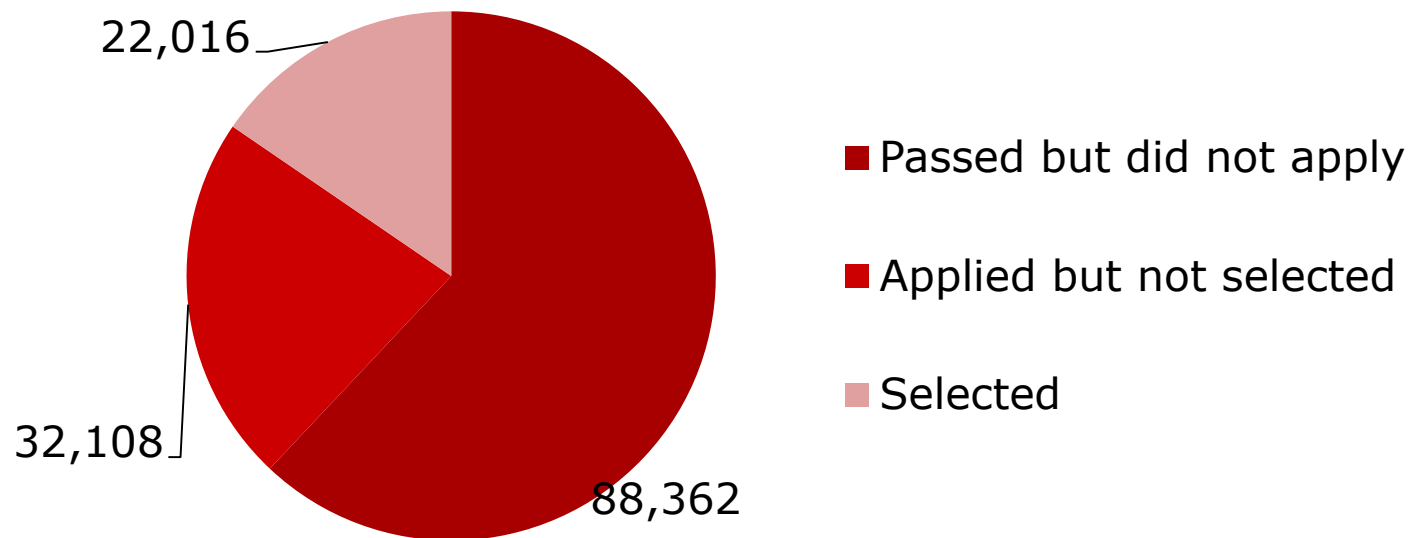
Source:

http://www.ugc.ac.lk/downloads/admissions/local_students/Admission%20to%20Undergraduate%20Courses%20of%20the%20Universities%20in%20Sri%20Lanka%202011_2012.pdf



Sri Lanka

142,016 students received min requirements at the 2010 GCE (A/L)



Public university system received 54,124 applications and admitted 22,016 for a selection rate of 41% ;32,108 were not selected; 88,362 did not apply

